OHAssist
making business better

OH Assist Customer Portal

User Guide

February 2014

The information given in this leaflet is of a general nature to support management action and decision making. It is not intended to be a substitute for specific medical advice. Where further or specific advice is required then please consult OH Assist™ for further guidance.

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Getting Started

with the OH Assist portal

Getting Started

About the OH Portal

The OH Portal, also known as Cosmas Vista is an Internet based web browser application that interfaces with OH Assist's core IT systems. It enables multiple users to access our occupational health services using their own PC terminals.

The OH Portal increases speed, efficiency and accessibility to our services and provide a secure environment to send, receive and view information.

This document details the step-by-step processes enabling users to facilitate making and managing occupational health referrals.

Please note that screen shots and data entered into fields within this document are for illustrative purposes only. While they are up to date at time of writing, changes to the Portal may render them out of date. Separate communications will precede changes to ensure all users are aware of changes made and every endeavour will be made to keep this document up to date. The most recent version of this document is available to download from https://www.ohportal.co.uk/FAQUserGuide.htm

Logging on

The OH Assist customer portal can be accessed at the following web address, using Internet Explorer v5.5 or greater, Google Chrome or Mozilla Firefox.

https://www.ohportal.co.uk

A secure log on ensures that confidentiality is maintained. You are asked to provide your email address as your user ID, a password and 2 digits from a 6 digit PIN.

When you log in for the first time, you will be requested to change your password and security number and provide an answer for a security question. This is to enable you to reset your password and security number should you forget them.

Register a new account

If you do not have an account it may be possible to create one yourself.

To do this, click the 'Register New Account' link on the log in screen. You will be asked for your e-mail address and this will be validated by the system.

Certain e-mail address domain names have been enabled to allow you to create your own account. This will have been enabled as part of your organisation's contract with OH Assist and may have been communicated to you separately.

If you cannot create your own account, it is likely that your organisation does not use this feature and that there will be a separate process for creating your account. Check your specific customer user guide for details on this or contact your customer helpdesk number.

Forgotten password or security number

If you are unable to remember your password or security number, click the 'I have forgotten my password/pin' link.

You will be asked to enter your email address and answer your security question which you complete when you log in for the first time.

You will be sent an email to your registered address containing a new password and security number. You must log in using these details within 1 working day or the account will lock and will be inaccessible. In this instance you must call your customer helpdesk number.

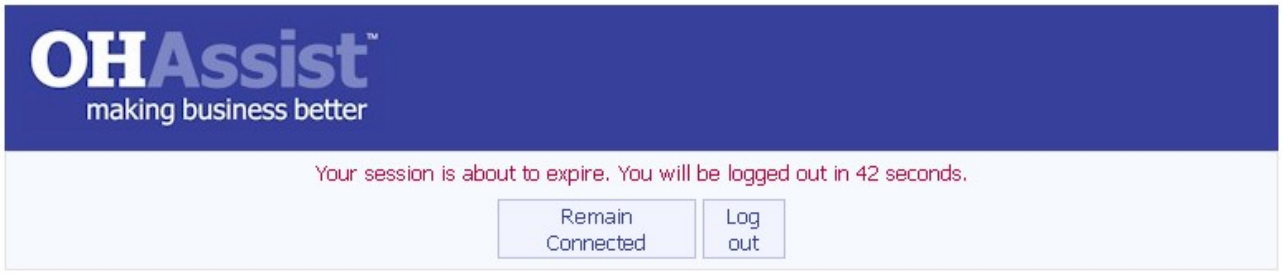
Self-unlock account

If you fail to enter your password and/or security number correctly 3 times, then you will be directed to the security question previously entered on account set-up. If you answer this question correctly then as above, a system generated email will be sent to your registered address containing a new password and security number. You must log in using these details within 1 working day or the account will lock and will be inaccessible.

If the user account is locked out due to previous failure to answer this security question successfully, or because no security question and answer has been recorded, the option to self-unlock will not be available, and you will be instructed to contact the helpdesk. Alternatively, a power user within your organisation will have the ability to unlock the account.

Session expiry

After 25 minutes of inactivity, you will be warned that your session is about to expire. It will offer you the chance to continue with your session or to log out, and give you one minute to respond.



Continuing your session will allow you to continue working. Failing to respond, or choosing to log out, will log you out.

Navigation menu

OH Portal has a navigation menu for ease of use. This is always located on the top right hand side of the page.

These links take you directly to the area of the application you require.

Note: Not all of the options displayed below may be available to you. Depending on your account type and service agreement with OH Assist.

OH Demo Company	FUNCTIONALITY AREA
View Messages	View, messages will display any messages we have sent to you
Unsubmitted Referrals	Displays any previously un-submitted or saved referrals
Transfer Referral	Allows the transfer of referral to another account. Note this option is only available to power users
Client List	Displays the main client list area, showing all referrals you have made, active and closed
Operational Reports	For accessing online reports on referral history, only available if you organisation has opted for this service
Maintain Account Details	Access this option to modify your personal details and change passwords
Administer Accounts	For modifying other user accounts – Power user only
Frequently Asked Questions	Accesses to frequently asked questions and answers
User Guide	Access to the latest copy of this document
Contact Us	Displays contact number and information and medical helpdesk email system.
Logout	Logs out of the application

Navigation bar

The navigation bar is located towards the bottom of the page and consists of 4 buttons. Use this to progress through the referral. (These buttons only become active when making a referral).

Allows you to step back a page and modify previous content

The abandon button discards the referral

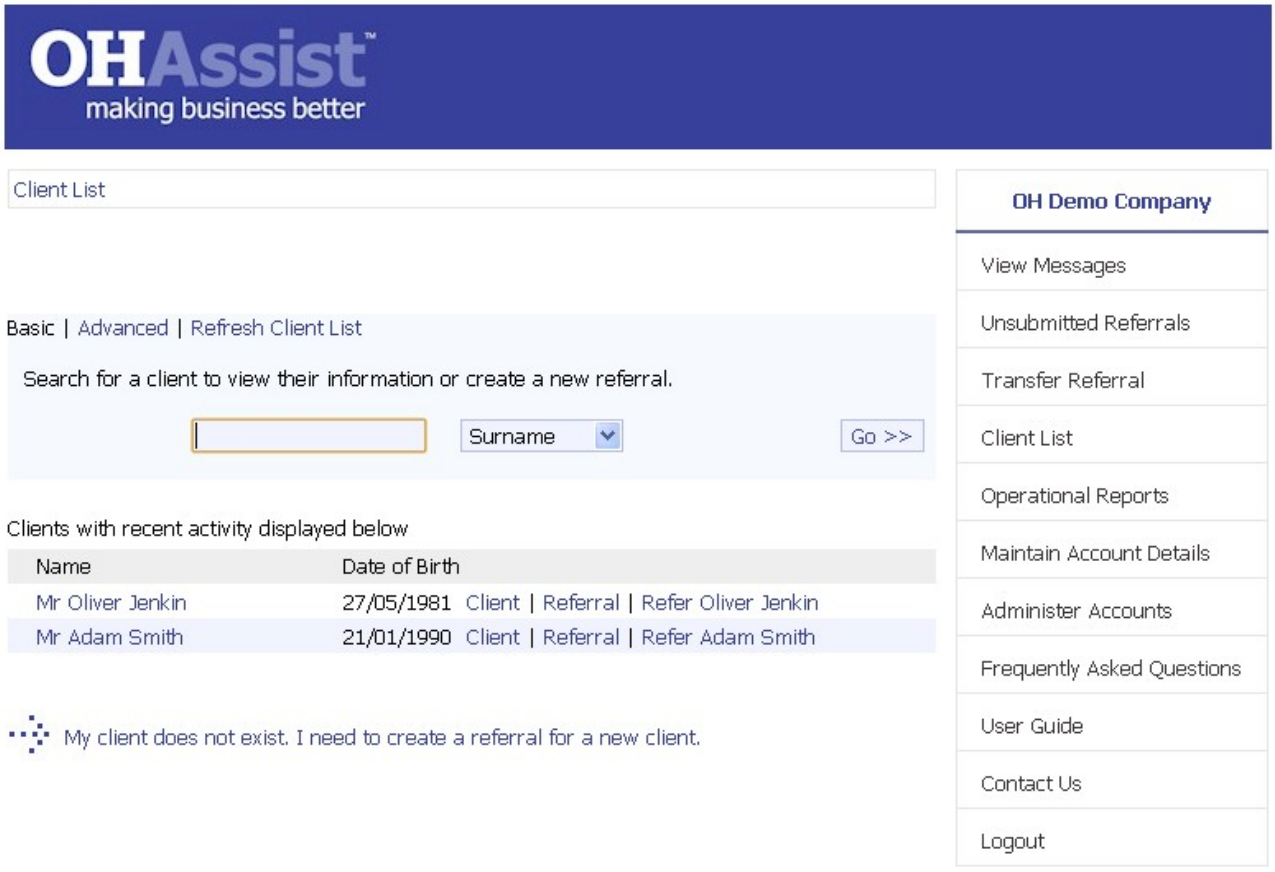
The complete button confirms that all amendments have been completed. This is only available while editing a page from the review and commit screen

The next button confirms that you have completed all text on the current page and progresses to the next step

The client list

The client list displays all of the previous referrals made by you or that you have been given access to by another user.

The client list is usually the first page displayed following log on, or it can be accessed by clicking 'Client List' on the navigation menu.



To search for a referral or employee, enter details into the text box; select the desired criteria from the drop down menu (Surname, Forename, Date of Birth, Referral ID or Customer Identifier) then click 'Go'.

For advanced search options, select advanced just above the search criteria box. Searches can then be performed by the same criteria as above, but also by Referring Manager (enter either surname, email address or customer identifier), by customer unit or referral state (open or closed).

Note: Customer Identifier is a unique identifier used to identify people within your organisation. If your organisation has specified a term to use for this, that will be displayed. If your organisation has not specified a term to be used, the label will be Customer ID

To view the employee's details click on Client.

To see the referrals for a particular employee please click on Referral(s) followed by the referral number if there is more than one referral.

To create a referral for some one who has been referred before, select 'Refer [employee name]' next to their name.

To create a new referral for an employee who has not been referred using the portal before, click on '**My client does not exist. I need to create a new referral for a new client**'.

Making Referrals

with the OH Assist portal

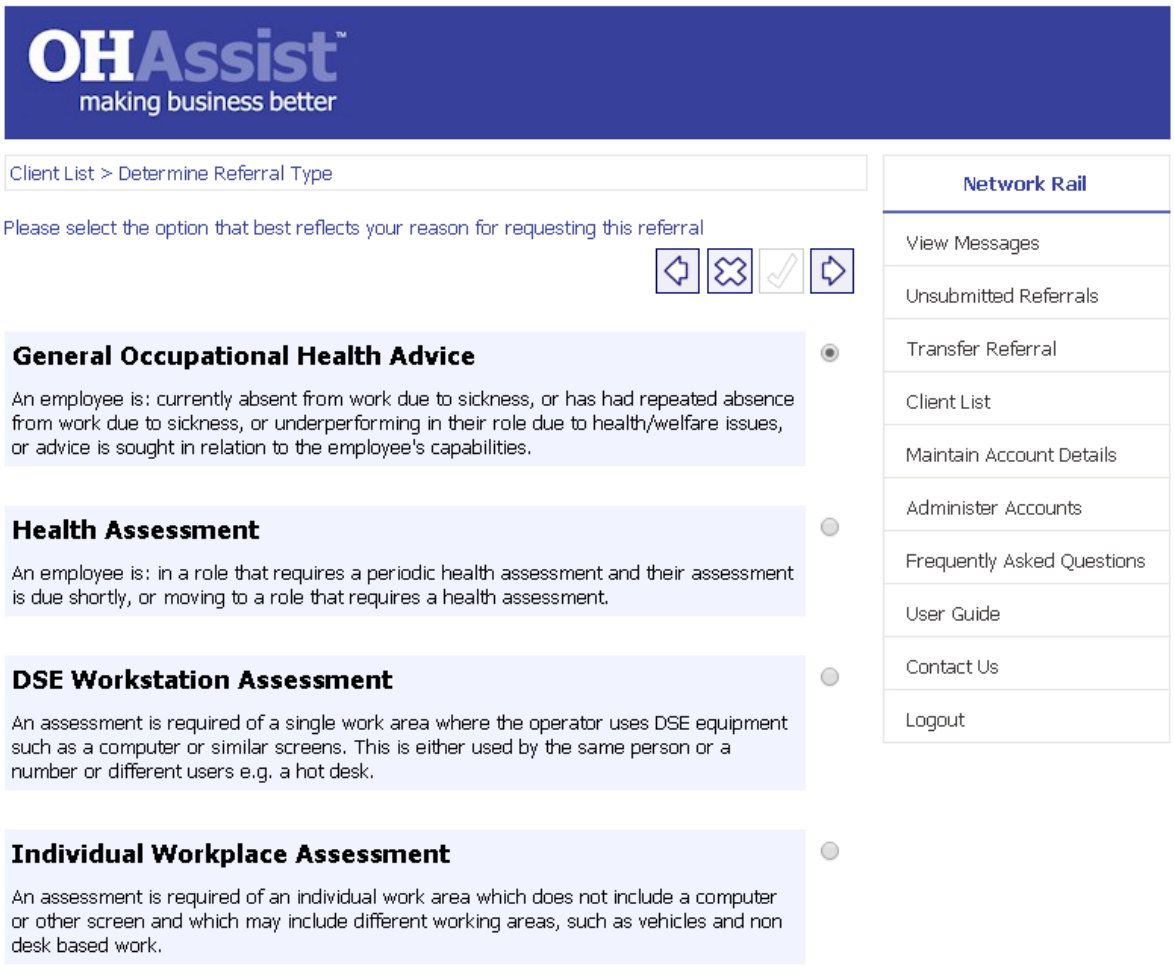
Creating a new referral

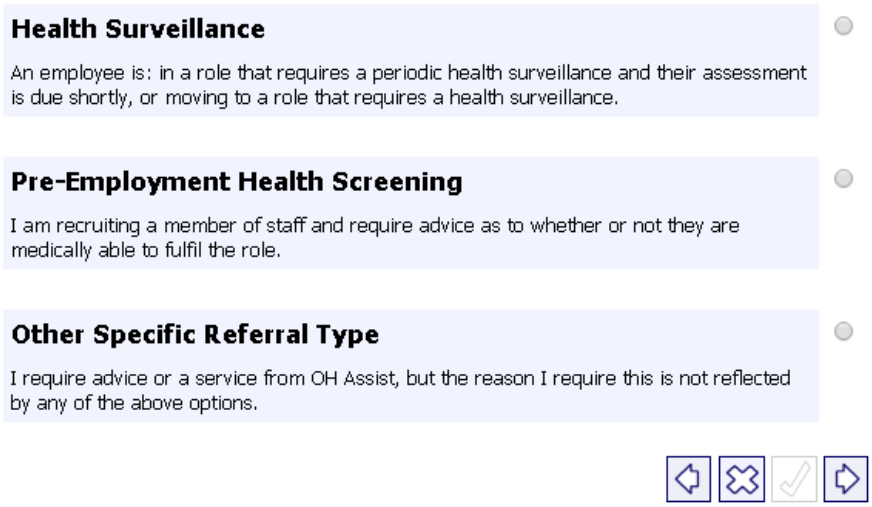
Using the OH Portal to create a referral for one of your employees is quick and easy, it should take only a few minutes of your time. Before you get started, ensure you have read your organisation specific user guide for the services available. You will need to get consent from the person you wish to refer and gaining this before you make a referral will ensure speedy processing. Make sure you check their availability too, there will be space to record this and it will help with appointment booking.

To create a new referral for an employee who has not been referred using the OH Portal before, navigate to the Client List and click on '**My client does not exist. I need to create a new referral for a new client**'.

To create a referral for someone who has been referred before, select the 'Refer' link next to their name.

You indicate what type of referral is required by selecting the radio button next to the referral type, then clicking next in the navigation bar.

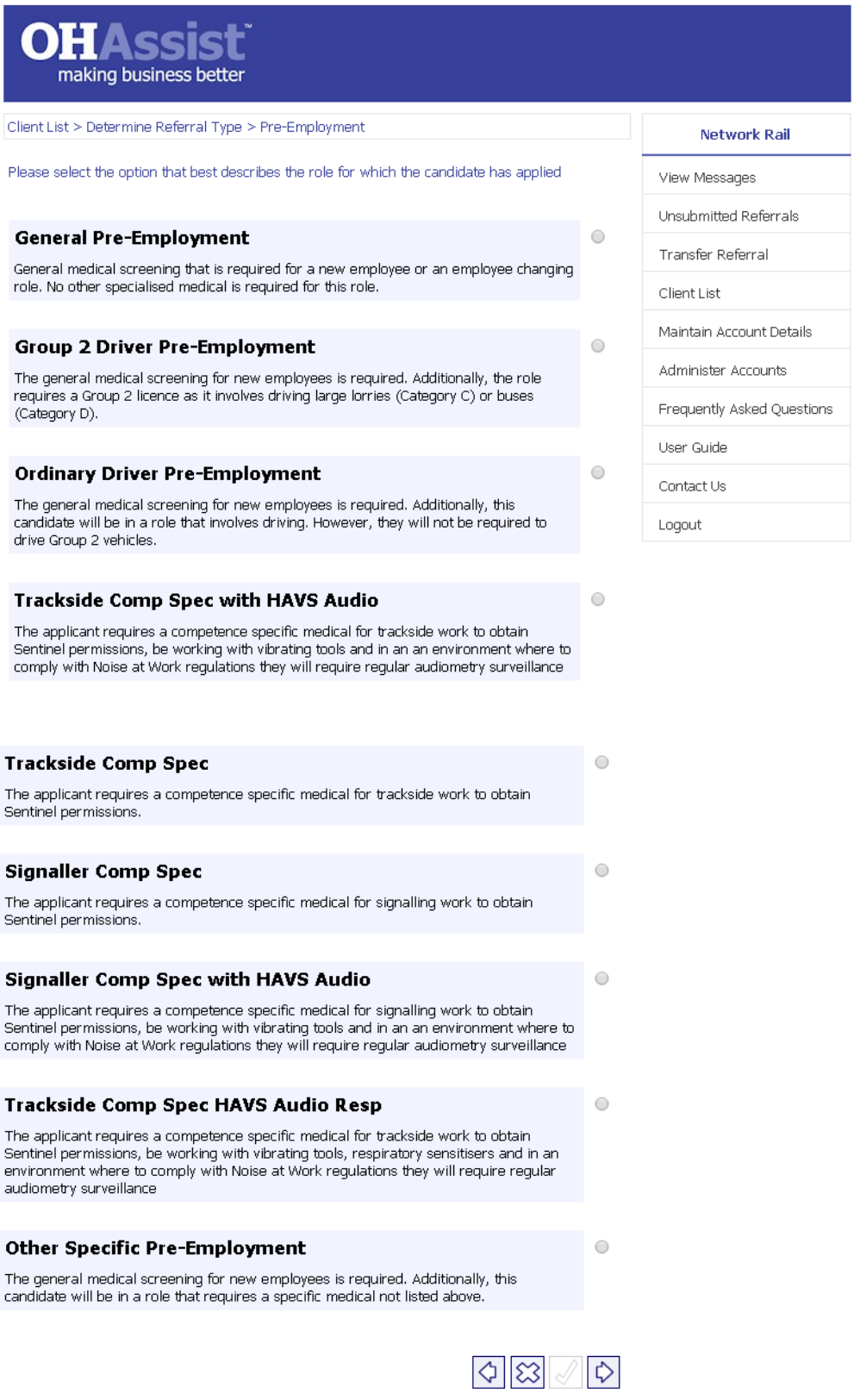

OHAssist
making business better
Client List > Determine Referral Type
Please select the option that best reflects your reason for requesting this referral
General Occupational Health Advice
An employee is: currently absent from work due to sickness, or has had repeated absence from work due to sickness, or underperforming in their role due to health/welfare issues, or advice is sought in relation to the employee's capabilities.
Health Assessment
An employee is: in a role that requires a periodic health assessment and their assessment is due shortly, or moving to a role that requires a health assessment.
DSE Workstation Assessment
An assessment is required of a single work area where the operator uses DSE equipment such as a computer or similar screens. This is either used by the same person or a number or different users e.g. a hot desk.
Individual Workplace Assessment
An assessment is required of an individual work area which does not include a computer or other screen and which may include different working areas, such as vehicles and non desk based work.
Network Rail
View Messages
Unsubmitted Referrals
Transfer Referral
Client List
Maintain Account Details
Administer Accounts
Frequently Asked Questions
User Guide
Contact Us
Logout


Health Surveillance
An employee is: in a role that requires a periodic health surveillance and their assessment is due shortly, or moving to a role that requires a health surveillance.
Pre-Employment Health Screening
I am recruiting a member of staff and require advice as to whether or not they are medically able to fulfil the role.
Other Specific Referral Type
I require advice or a service from OH Assist, but the reason I require this is not reflected by any of the above options.

Each referral type has a description to enable you to select the appropriate type of assessment. The list only displays products that your organisation has agreed to purchase.

Should the type of assessment not be in this list and not available through any other referral method (please see the Occupational Health User Guide for your organisation or contact a member of HR), you should select 'Other Specific Referral Type'. This enables the user you to submit a request that OH Assist can price up specifically for your needs, known as a Bespoke or Optional Service (please see section on Creating Optional/Bespoke Requests).

Following the selection of a referral type, you then select a referral subtype, if applicable. This is a specific type of medical that may be required to cover a specific role or role specific legislation. This will tailor the questions in the following pages to suit the referral purpose.


OHAssist
making business better
Client List > Determine Referral Type > Pre-Employment
Please select the option that best describes the role for which the candidate has applied
General Pre-Employment
General medical screening that is required for a new employee or an employee changing role. No other specialised medical is required for this role.
Group 2 Driver Pre-Employment
The general medical screening for new employees is required. Additionally, the role requires a Group 2 licence as it involves driving large lorries (Category C) or buses (Category D).
Ordinary Driver Pre-Employment
The general medical screening for new employees is required. Additionally, this candidate will be in a role that involves driving. However, they will not be required to drive Group 2 vehicles.
Trackside Comp Spec with HAVS Audio
The applicant requires a competence specific medical for trackside work to obtain Sentinel permissions, be working with vibrating tools and in an an environment where to comply with Noise at Work regulations they will require regular audiometry surveillance
Trackside Comp Spec
The applicant requires a competence specific medical for trackside work to obtain Sentinel permissions.
Signaller Comp Spec
The applicant requires a competence specific medical for signalling work to obtain Sentinel permissions.
Signaller Comp Spec with HAVS Audio
The applicant requires a competence specific medical for signalling work to obtain Sentinel permissions, be working with vibrating tools and in an an environment where to comply with Noise at Work regulations they will require regular audiometry surveillance
Trackside Comp Spec HAVS Audio Resp
The applicant requires a competence specific medical for trackside work to obtain Sentinel permissions, be working with vibrating tools, respiratory sensitisers and in an environment where to comply with Noise at Work regulations they will require regular audiometry surveillance
Other Specific Pre-Employment
The general medical screening for new employees is required. Additionally, this candidate will be in a role that requires a specific medical not listed above.
Network Rail
View Messages
Unsubmitted Referrals
Transfer Referral
Client List
Maintain Account Details
Administer Accounts
Frequently Asked Questions
User Guide
Contact Us
Logout

Note that different options may be available to you depending on which services your organisation has requested are made available.

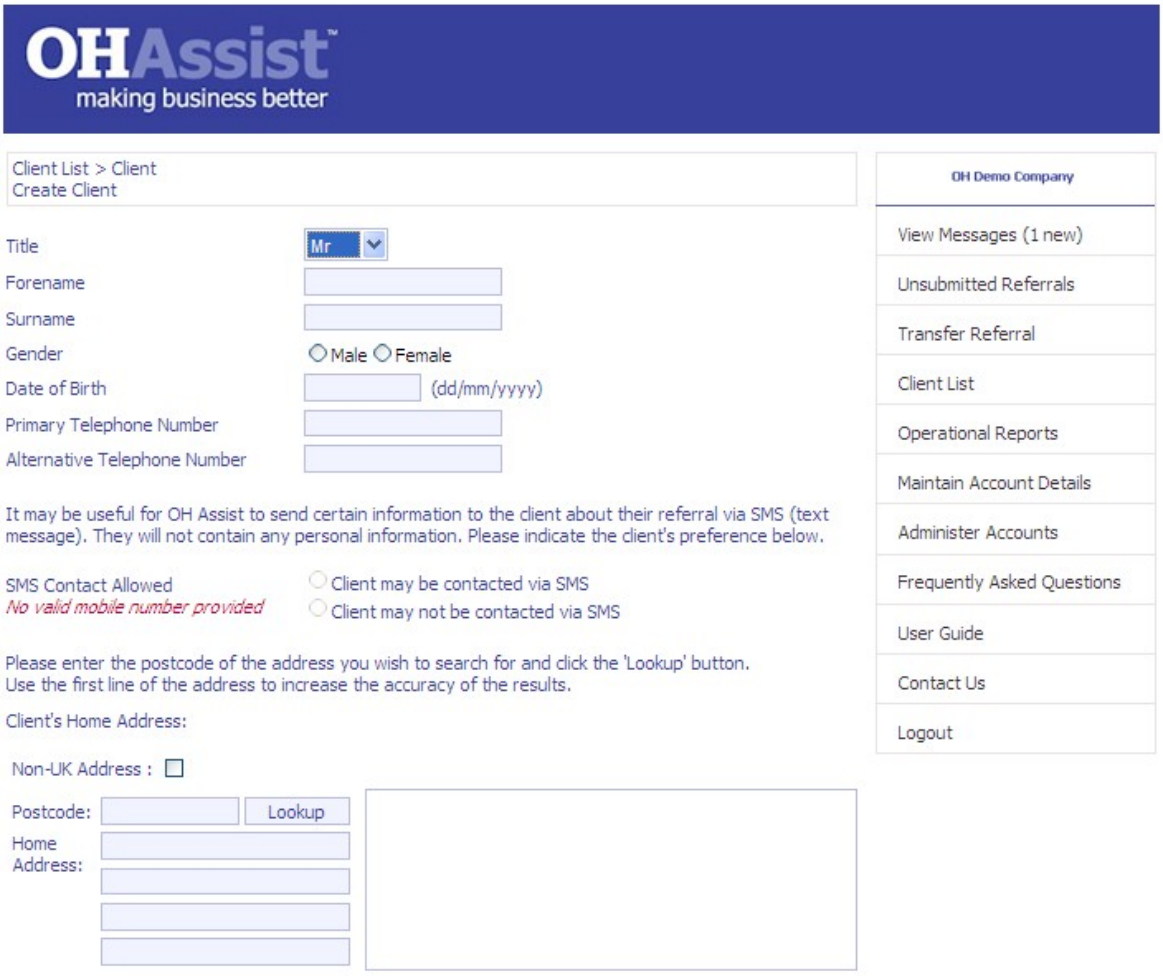
Record client details

After selecting the referral type you will record basic details about the employee being referred so that the referral can be registered into our database.

The address entry sections have Quick Address Searching. You can enter the postcode and optionally a house number in the first line of the address and by clicking 'Lookup' the address is found automatically.

If your employee lives outside of the UK, tick Non-UK address to enter the address without a postcode. (The address look up does not support Non-UK address' and will be disabled as will the postcode field).

If you enter a valid mobile number, you may need to confirm whether the employee consents to being contacted by text message, if your organisation has enabled this kind of communication.


OHAssist
making business better
Client List > Client
Create Client
OH Demo Company
View Messages (1 new)
Unsubmitted Referrals
Transfer Referral
Client List
Operational Reports
Maintain Account Details
Administer Accounts
Frequently Asked Questions
User Guide
Contact Us
Logout
Title
Mr
Forename
Surname
Gender
Male Female
Date of Birth
(dd/mm/yyyy)
Primary Telephone Number
Alternative Telephone Number
It may be useful for OH Assist to send certain information to the client about their referral via SMS (text message). They will not contain any personal information. Please indicate the client's preference below.
SMS Contact Allowed
No valid mobile number provided
Client may be contacted via SMS
Client may not be contacted via SMS
Please enter the postcode of the address you wish to search for and click the 'Lookup' button.
Use the first line of the address to increase the accuracy of the results.
Client's Home Address:
Non-UK Address :
Postcode:
Lookup
Home Address:

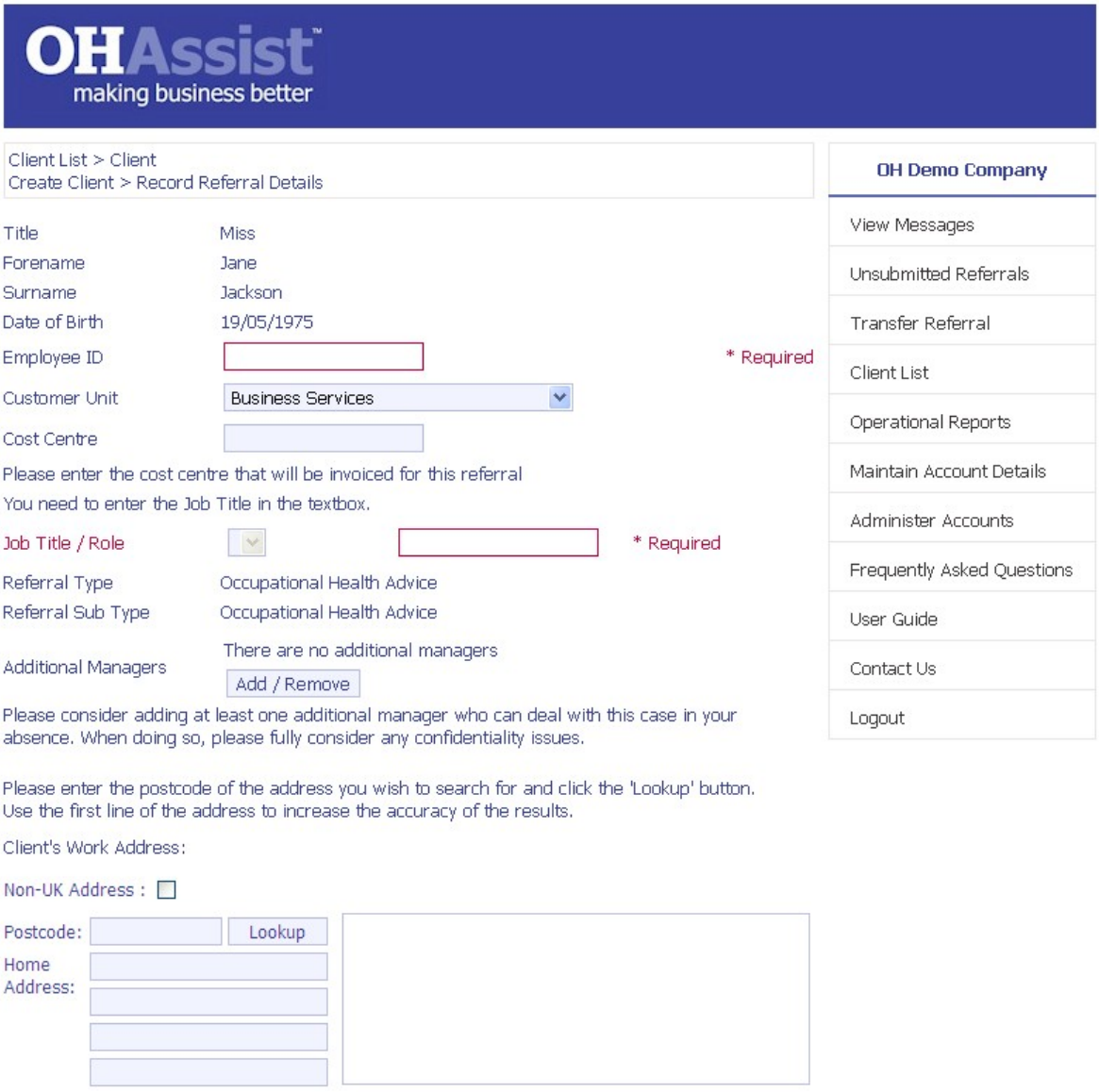
When you have finished entering details click on the 'Next' button on the bottom right of the screen.

Note: If you are re-referring an existing client, this screen will still appear allowing the user to maintain or update the client's details as necessary. If applicable, you will also need to re-confirm whether the employee consents to being contacted by text message.

Record referral details

Following the client details you are then presented with the Record Referral Details Screen. You input the employee's unique Customer Identifier (e.g. pay number or staff ID), the referring Customer Unit (department or location, division etc), and the employee's job title and work address which also has quick address searching.

If your employee works outside of the UK, tick Non-UK Address to enter the address without a postcode. (The address look up does not support Non-UK addresses and will be disabled as will the postcode field).

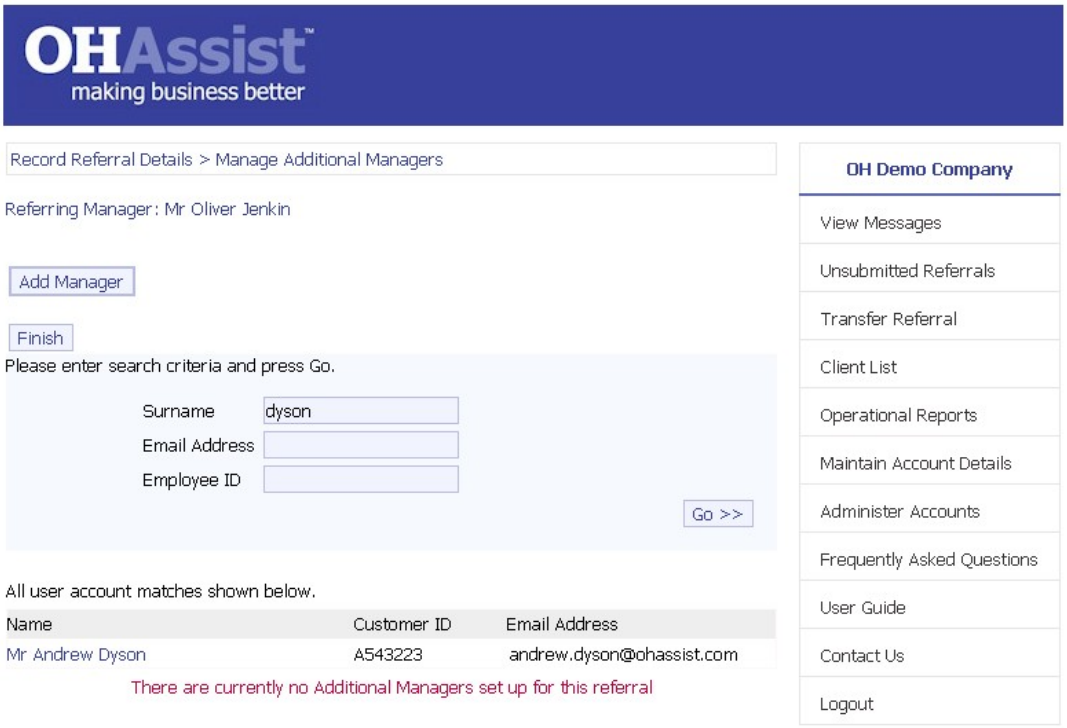


Note: Mandatory fields on each of the referral narrative screens must be filled in before the user can continue. These will be highlighted in Red if the user tries to continue without completing the necessary fields.

Additional managers

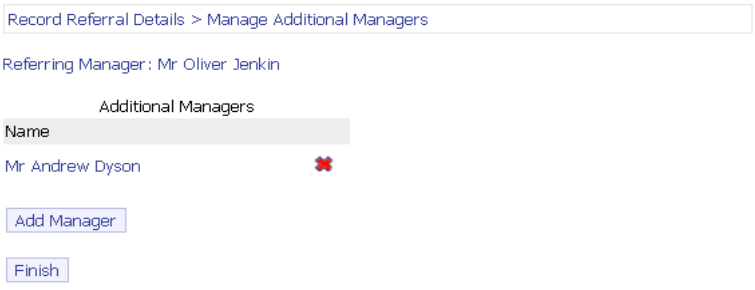
You can also add additional managers by clicking the Add/Remove button. The manager must be a registered Portal user; this will allow them to receive updates and access to reports produced from a referral.

Upon clicking Add Manager you will be presented with a search dialogue. Search by entering the additional surname, email address or Customer Identifier of the user you are looking for, then click Go. Any matching managers who already have accounts will be displayed. Additional Managers must have accounts for this functionality to be used.



To select, click on their name to add them to your referral. You may add up to a maximum of 10 additional managers to a referral.

It's possible to remove an additional manger, either at this stage or at a subsequent point in the referral life cycle. View the referral by selecting if from the client list. Scroll down to the managed additional mangers section and click the Add/Remove button. To remove an additional manager press the red x shaped button next to their name.



Referral questions

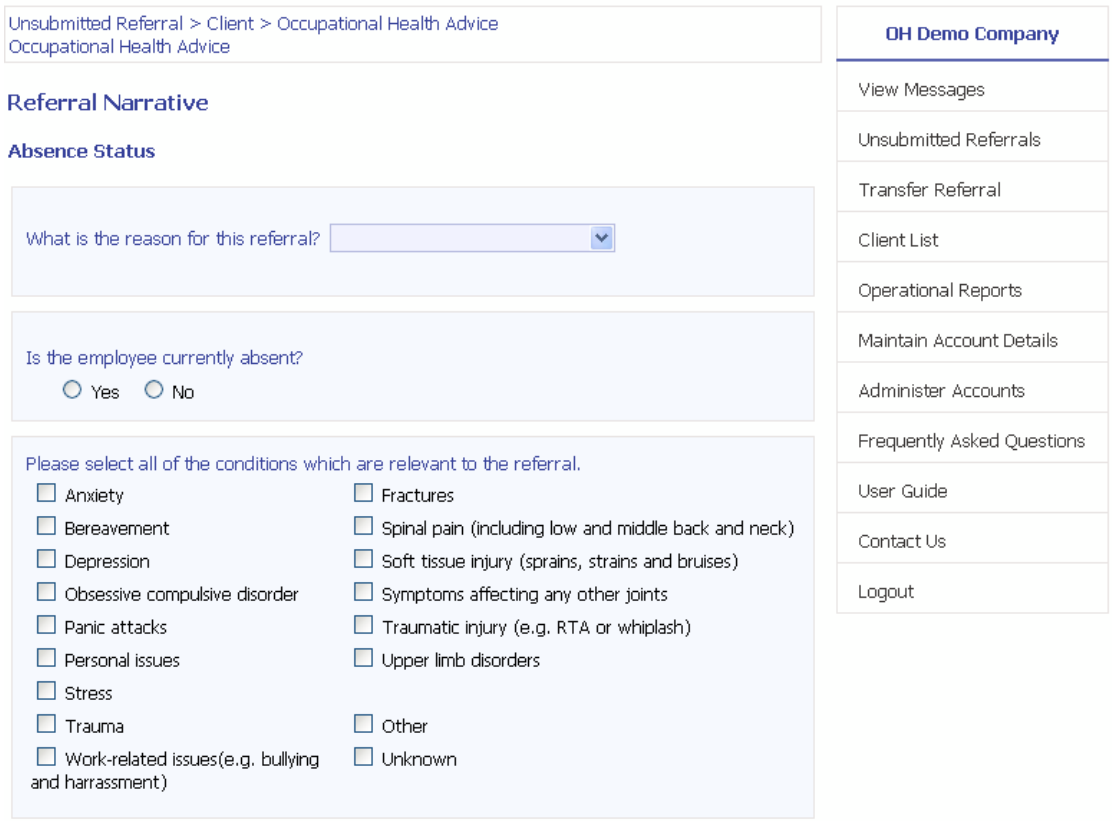
OH Assist has designed a series of questions to capture specific information relating to the employee, their specific health situation, absence history and job role directly from the referring manager.

The data will always be captured on a single page within the browser. The majority of the questions can be answered by selecting from dropdown lists, by selecting radio button or checkbox options.

OH Assist's team of occupational health practitioners can then supply tailored advice, providing support for the manager in managing sick absence or a particular work or health situation. Certain questions are mandatory to ensure that relevant information is captured.

The questions which will be addressed will vary depending on the type of referral you are submitting. As part of the occupational health consultation and assessment, the practitioner will address the following issues as a matter of course:

- Advice on the health condition(s) and prognosis
- Current work capability
- An estimate of return to work date and a return to work plan, if necessary
- If a return to full duties is unlikely, advice on modifications to allow continued employment and the duration of such modifications
- An opinion on disability according to current legislation

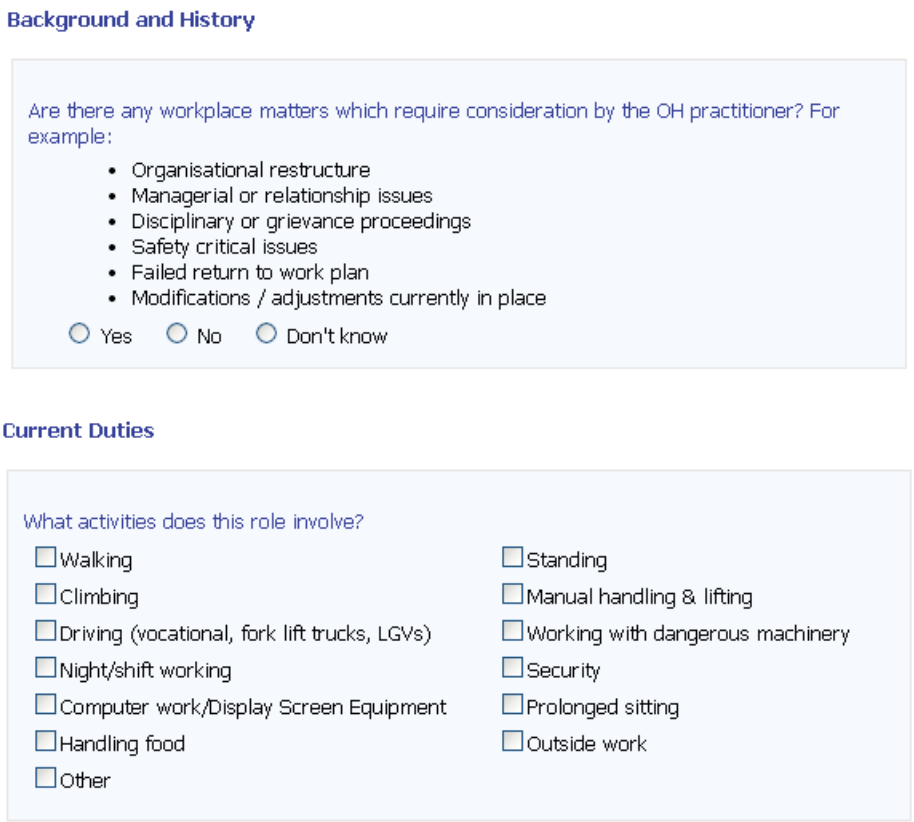


Background and history

In order to help our practitioners asses your employee, information on their background and history can be recorded. If there are any workplace matters you wish to record click yes and a additional text box will appear. Otherwise you must indicate 'No' or 'Don't Know' relevant to the situation.

There is also a list of example prompts to guide you if you are unsure. For example, you should use this section to notify us of any workplace accidents or incidents relevant to the period of absence. In addition, this section can be used to provide an outline of potential modified work which may be available, or any limitations regarding job modifications.

There is also a list of common work duties to choose from, if the required duty is not listed, click 'Other' and then type the duty in the text box that becomes available.



Additional questions

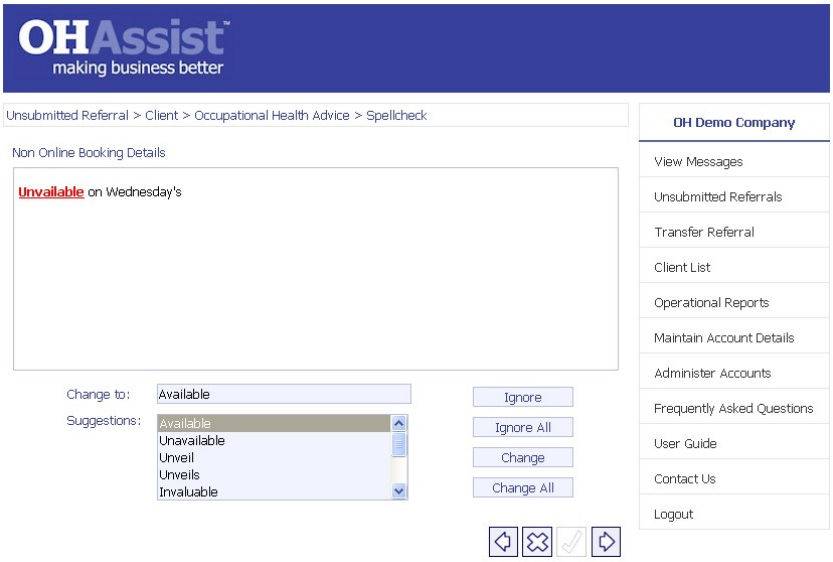
A list of the questions that will be answered as a matter of course is included. The report will normally provide you with all you need to progress and manage the case, and there should be no need for you to ask additional questions. However, in some cases there will be exceptions, including safety critical issues, questions about retirement or fitness to attend a disciplinary meeting and these can be asked in the section below.

Please don't ask questions about the exact diagnosis, the type of medication employees are taking, how many days absence an employee is likely to have in the future, or whether you should adjust trigger points. Practitioners are unable to answer these types of questions.

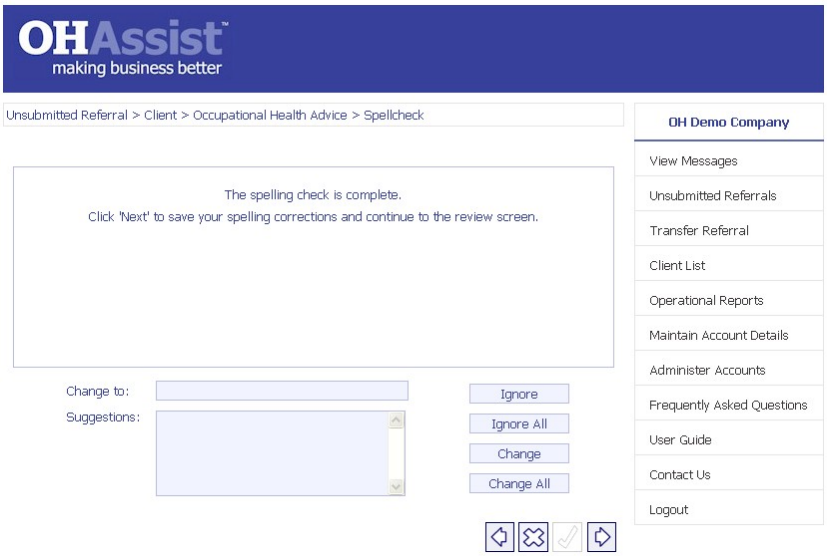
Questions
The Report will always cover;
Advice on the health condition(s) and prognosis
Current work capability
An estimate of return to work date and a return to work plan if necessary
If a return to full duties is unlikely, advice on modifications to allow continued employment and the duration of such modifications
An opinion on disability according to current legislation
Please specify any additional questions you have (up to a maximum of 3)
Question 1
Please note that you will be able to upload further documentation, such as a job description, when you have submitted your referral.
Unavailability and Special Requirements
Does the client have any special requirements which may prevent a telephone consultation (e.g. deafness, requirement for an interpreter, etc.)?
Yes
No

Spell checking

Once all the referral pages are complete, Any free text you have imputted will be spell checked. You have the option to Ignore the highlighted word, ignore all instances of the highlighted word, accept the suggested word by selecting change or accepting the suggested word in all instances of suggestion by selecting change all.

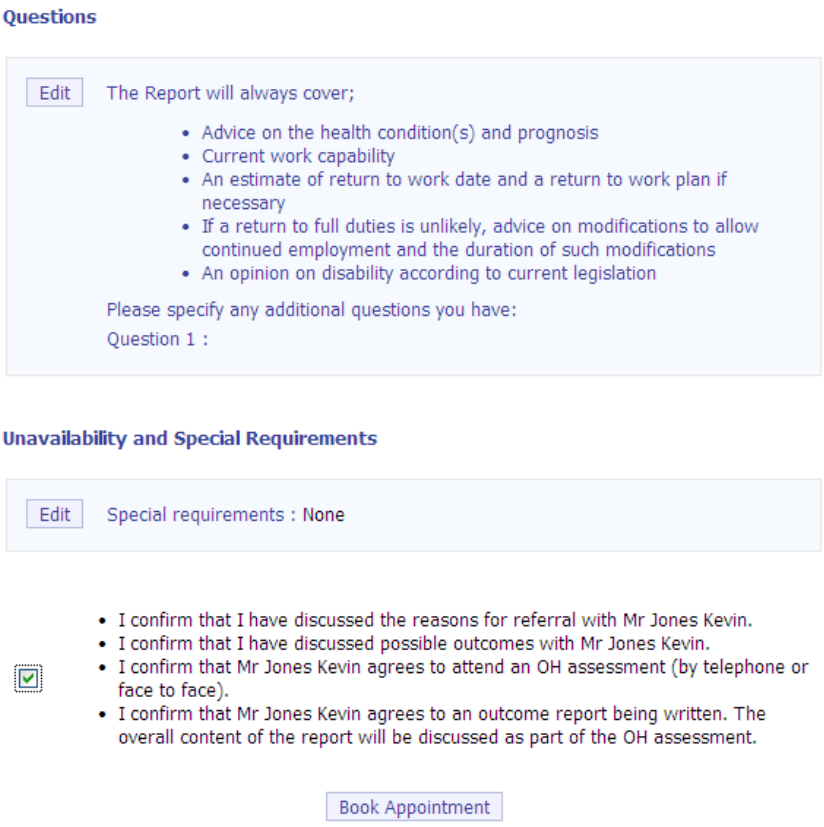


If there are no spelling errors, or the spelling check is complete, you will be presented with the Spelling Check is complete screen.



Review and submit

Following the completion of the referral and the spell check, you can choose to edit any of the fields you have filled in, by clicking on edit next to the relevant section. If you are happy with all the sections you can submit the referral. This completes the initial submission of your referral. Depending on the type referral and consent required for your organisation you may be required to upload or send in additional documentation to OH Assist.

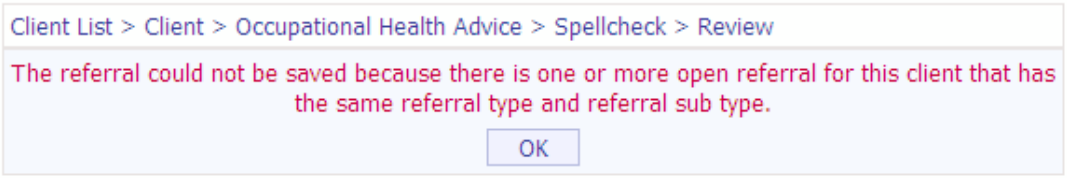

Questions
Edit
The Report will always cover;
Advice on the health condition(s) and prognosis
Current work capability
An estimate of return to work date and a return to work plan if necessary
If a return to full duties is unlikely, advice on modifications to allow continued employment and the duration of such modifications
An opinion on disability according to current legislation
Please specify any additional questions you have:
Question 1 :
Unavailability and Special Requirements
Edit
Special requirements : None
I confirm that I have discussed the reasons for referral with Mr Jones Kevin.
I confirm that I have discussed possible outcomes with Mr Jones Kevin.
I confirm that Mr Jones Kevin agrees to attend an OH assessment (by telephone or face to face).
I confirm that Mr Jones Kevin agrees to an outcome report being written. The overall content of the report will be discussed as part of the OH assessment.
Book Appointment

Note: Where your organisation has not enabled online booking, or where you are making a referral for an appointment type where online booking does not apply, you will see “Submit Referral” above instead of “Book Appointment”.

Where contractual or verbal consent is required (as opposed to a signed copy) you must tick the box above submit referral before the referral can be submitted.

The system performs an employee matching exercise to ascertain if the employee already has a record with OH Assist. If so, it associates this referral with the existing record.

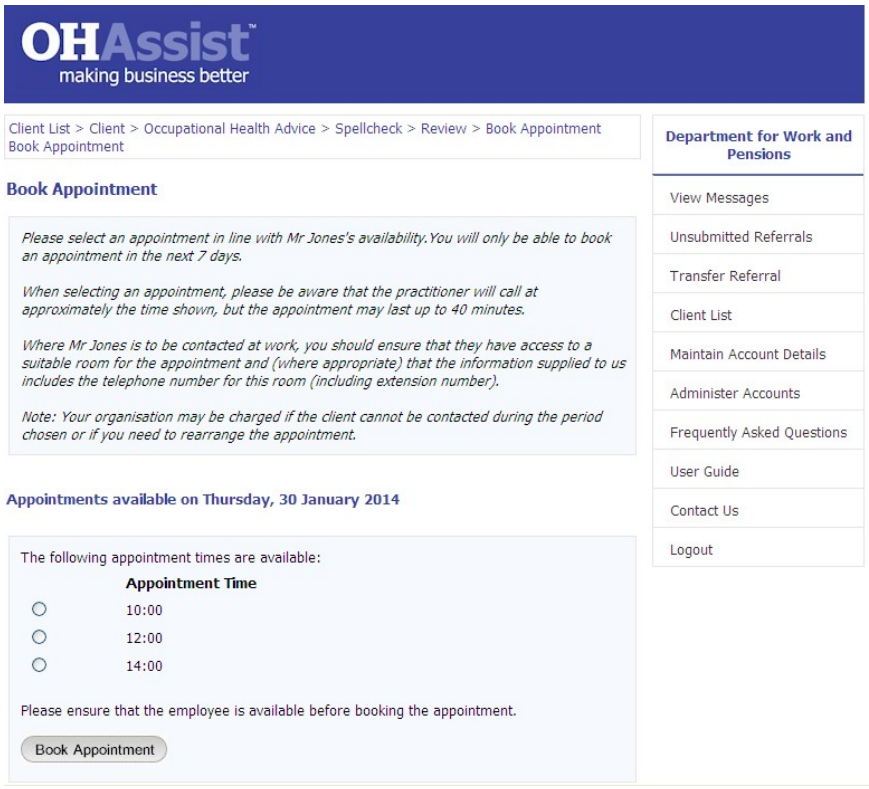
If the employee already has an open referral submitted by the user, or the user is an additional manager on an open referral of the same referral type, the referral will be rejected. This is to ensure that OH Assist do not progress multiple referrals for a single employee. The following warning message will be displayed.


Client List > Client > Occupational Health Advice > Spellcheck > Review
The referral could not be saved because there is one or more open referral for this client that has the same referral type and referral sub type.
OK

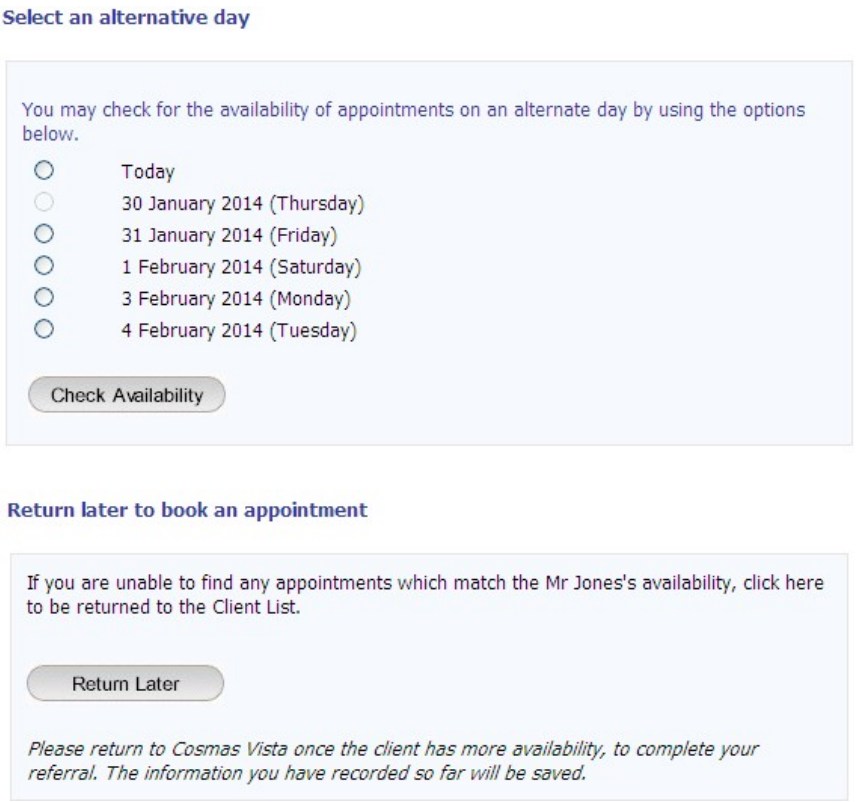
Online appointment booking

If you are creating a referral of type Occupational Health Advice or OH Advice Plus and your organisation has chosen to enable this facility, you may be required to book a slot for the initial telephone appointment with an OH Assist practitioner.

You will be offered a selection of appointment slots on the soonest available day. These will be spaced throughout the day to maximise the likelihood of one of the slots being suitable. Appointments may be offered on any day of the week, excluding Sunday, and may be between 08:00 and 20:00. Appointments will be booked for a precise time, but you should make your employee aware that the practitioner may call within 10 minutes either side of this time. The call with the practitioner may last up to 40 minutes.


OHAssist
making business better
Client List > Client > Occupational Health Advice > Spellcheck > Review > Book Appointment
Book Appointment
Book Appointment
Please select an appointment in line with Mr Jones's availability.You will only be able to book an appointment in the next 7 days.
When selecting an appointment, please be aware that the practitioner will call at approximately the time shown, but the appointment may last up to 40 minutes.
Where Mr Jones is to be contacted at work, you should ensure that they have access to a suitable room for the appointment and (where appropriate) that the information supplied to us includes the telephone number for this room (including extension number).
Note: Your organisation may be charged if the client cannot be contacted during the period chosen or if you need to rearrange the appointment.
Appointments available on Thursday, 30 January 2014
The following appointment times are available:
Appointment Time
10:00
12:00
14:00
Please ensure that the employee is available before booking the appointment.
Book Appointment
Department for Work and Pensions
View Messages
Unsubmitted Referrals
Transfer Referral
Client List
Maintain Account Details
Administer Accounts
Frequently Asked Questions
User Guide
Contact Us
Logout

If none of the appointments offered are suitable, you may opt to be shown available appointment slots on any of the next six calendar days (excluding Sundays).


Select an alternative day
You may check for the availability of appointments on an alternate day by using the options below.
Today
30 January 2014 (Thursday)
31 January 2014 (Friday)
1 February 2014 (Saturday)
3 February 2014 (Monday)
4 February 2014 (Tuesday)
Check Availability
Return later to book an appointment
If you are unable to find any appointments which match the Mr Jones's availability, click here to be returned to the Client List.
Return Later
Please return to Cosmas Vista once the client has more availability, to complete your referral. The information you have recorded so far will be saved.

Any appointment slot offered will be held for the user 5 minutes whilst a decision is made. If you allow this time to elapse without selecting an appointment slot, new possible appointment slots must be generated, which may not be the same as those previously offered.

You may select an appointment slot and progress to booking. If you are unable to find a suitable slot, you may exit and return to complete the referral process at a later date. If you are booking an appointment following an online cancellation this must be completed within 30 days.

If no appointment slots are found on any of the possible days, you will be instructed to contact the helpdesk.

Supporting documentation

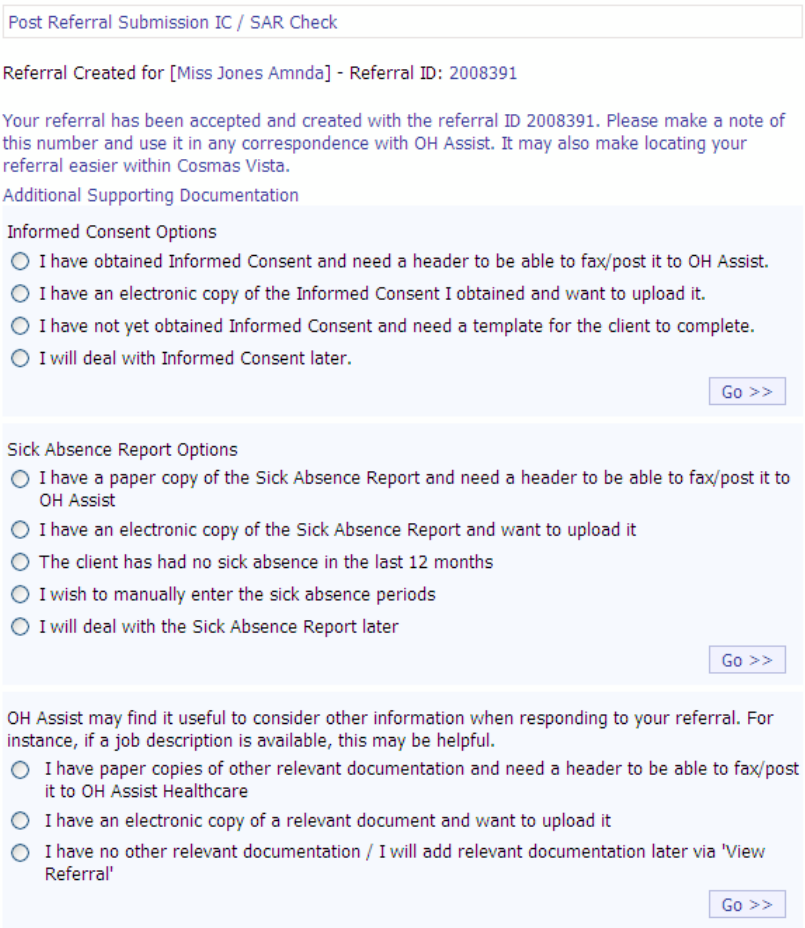
For the majority of referrals we require some supporting documentation, following the submission of your referral we will ask you to supply these or indicate that you have no supporting documentation.

For example if your organisation requires we have written consent for an employee then you will be asked to upload it, or indicate you wish to fax or post it to us. The second option will allow you to print a header sheet to include with the consent and the address with which to post it to.

It is also possible for you to send these documents at a later date, but please bear in mind that documents **must** be received within **8 days**, after which the referral will time out and be withdrawn.

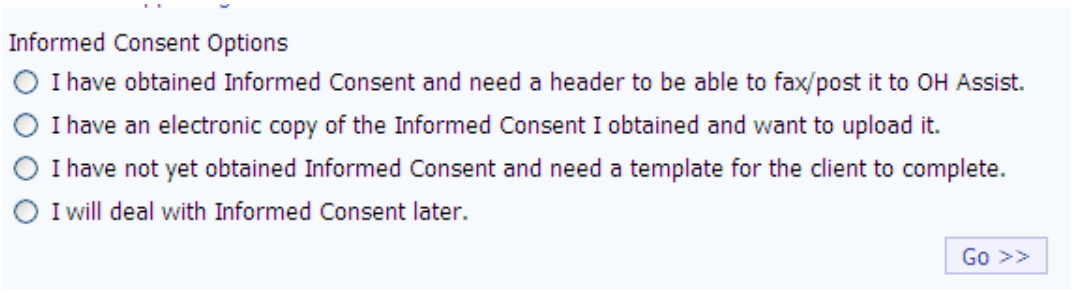
If documentation is sent electronically (faxed or uploaded) the referral timescales are reduced as these documents are usually processed within 1 working day of receipt. When uploading we allow a **maximum file size of 5mb (megabytes).** You will also not be able to see any of the documents that you upload with the exception of sick absence reports.

Please note that you may not see all of these options, depending on what requirements your organisation has and what type of referral you are making.


Post Referral Submission IC / SAR Check
Referral Created for [Miss Jones Amnda] - Referral ID: 2008391
Your referral has been accepted and created with the referral ID 2008391. Please make a note of this number and use it in any correspondence with OH Assist. It may also make locating your referral easier within Cosmas Vista.
Additional Supporting Documentation
Informed Consent Options
I have obtained Informed Consent and need a header to be able to fax/post it to OH Assist.
I have an electronic copy of the Informed Consent I obtained and want to upload it.
I have not yet obtained Informed Consent and need a template for the client to complete.
I will deal with Informed Consent later.
Go >>
Sick Absence Report Options
I have a paper copy of the Sick Absence Report and need a header to be able to fax/post it to OH Assist
I have an electronic copy of the Sick Absence Report and want to upload it
The client has had no sick absence in the last 12 months
I wish to manually enter the sick absence periods
I will deal with the Sick Absence Report later
Go >>
OH Assist may find it useful to consider other information when responding to your referral. For instance, if a job description is available, this may be helpful.
I have paper copies of other relevant documentation and need a header to be able to fax/post it to OH Assist Healthcare
I have an electronic copy of a relevant document and want to upload it
I have no other relevant documentation / I will add relevant documentation later via 'View Referral'
Go >>

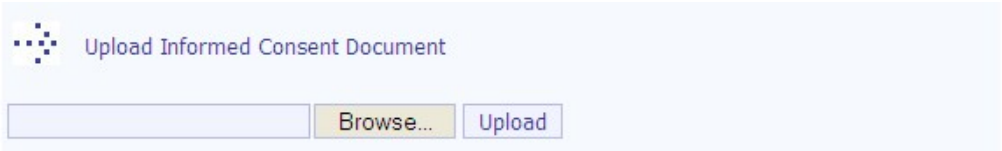
Informed consent (IC)

It may be necessary to send OH Assist a signed copy of the employee's informed consent, or in the case of a pre-placement screening, a health declaration. This is always the case unless consent is contained within employees' contract of employment or terms and conditions. This is determined during contract negotiations between your organisation and OH Assist. If consent is contractual or verbal consent only then this option will not be required.


Informed Consent Options
I have obtained Informed Consent and need a header to be able to fax/post it to OH Assist.
I have an electronic copy of the Informed Consent I obtained and want to upload it.
I have not yet obtained Informed Consent and need a template for the client to complete.
I will deal with Informed Consent later.
Go >>

To provide flexibility the signed IC can be posted or faxed to OH Assist. You will have the option to download or print a standard, pre-filled fax or post header sheet to send with the informed consent. This is shown in Appendix D. To download one select the top option, then click 'Go >>'.

The informed consent can be uploaded, providing that the copy uploaded contains the signature of the employee. Therefore to use this option you must be able to scan the informed consent. To upload an informed consent, select 'I have an electronic copy of the Informed Consent I obtained and I wish to upload it, then click 'Go >>'. Use the upload box that will appear after clicking go, to find the consent form on your computer. You may upload any document or image file up to 5mb in size.



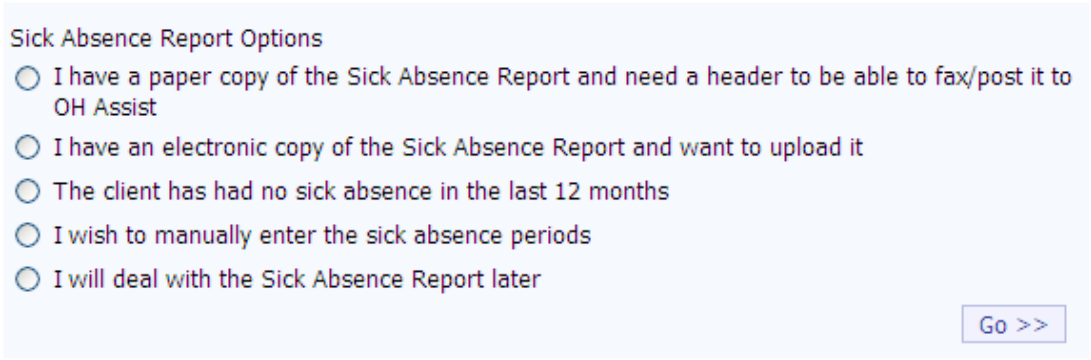
If the consent has not been gained from the employee prior to the referral being made, a part filled template can be downloaded for the employee to sign and date. This will enable the use of consistent forms, processes and speed up the completion of the consent. To download a part filled template, select 'I have not yet obtained Informed Consent and need a template for the employee to complete' and click 'Go >>'. You will then be asked whether you wish to Open or Save the document.

Should you not wish to deal with the Informed Consent at this time, the 'I will deal with the Informed Consent later' option should be selected.

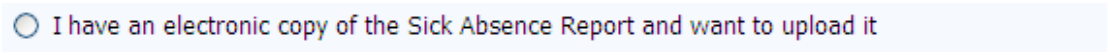
Sick absence report (SAR)

The absence history of an employee is integral to the referral process. OH Assist requires a Sick Absence Report showing the last 12 months of absence for certain types of referral.

You are given a series of options to choose how to supply the Sick Absence report.


Sick Absence Report Options
I have a paper copy of the Sick Absence Report and need a header to be able to fax/post it to OH Assist
I have an electronic copy of the Sick Absence Report and want to upload it
The client has had no sick absence in the last 12 months
I wish to manually enter the sick absence periods
I will deal with the Sick Absence Report later
Go >>

If you want to electronically upload a SAR select the option:

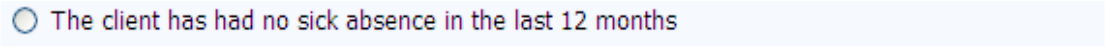


Then click go and you will be presented with a dialogue box to locate the electronic copy of the sick absence report. Click browse to locate it on your computer or network, select it and then click ok. To complete the upload process, you must click Upload. This may take a few moments. The file you upload can be in any widely available format, such as text files (.txt) MS Excel files (.csv, .xls) and MS Word or rich text documents (.doc and .rtf) or portable document format (.pdf).

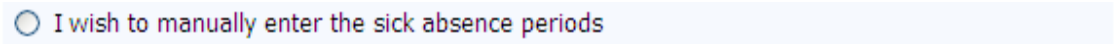
If you cannot upload the SAR, for example, because it is only available hard copy, then select the option:

You will be prompted to download a header sheet to accompany your document. If you downloaded a fax / post header in the Informed Consent options you will not need to again and this option will disappear. Print off the form and post to the address on the sheet or fax to the number indicated in your customer user guide.

If the employee has had no sick absence in the last 12 months, simply select this option:

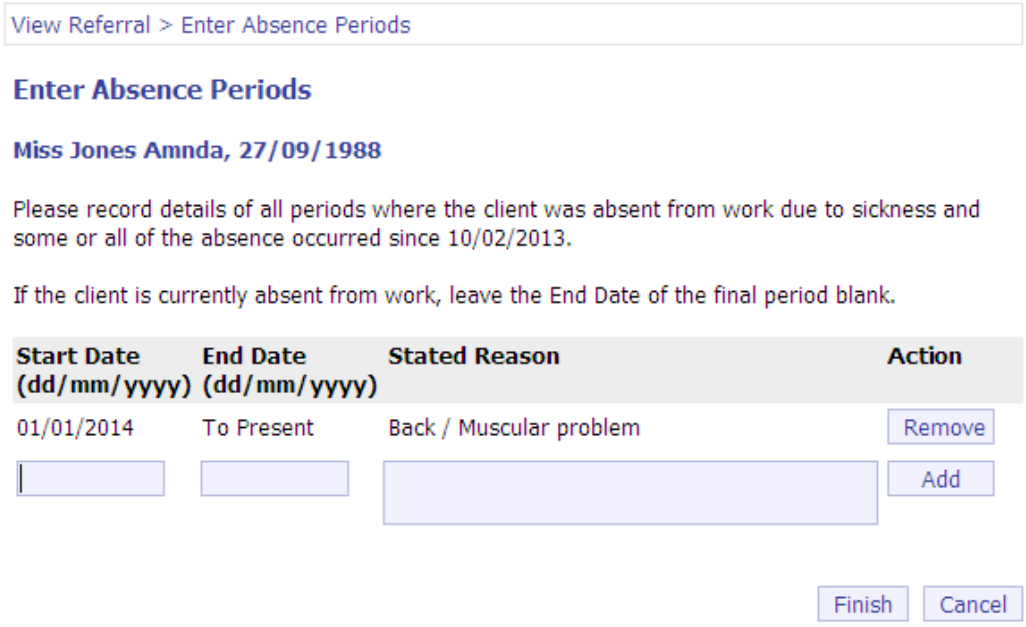


If you want to manually enter the sick absence periods select:

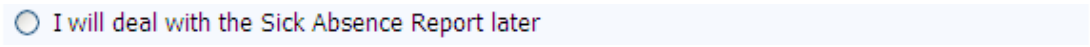


You will be able to enter the periods of absence and the reason for absence for the last 12 month period.

If the Date of First Absence question has been completed in the Referral Narrative questions, the first absence date will be defaulted to this date.

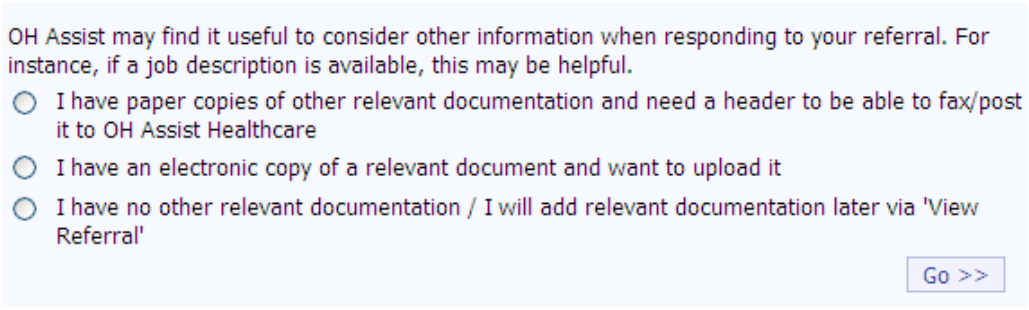

View Referral > Enter Absence Periods
Enter Absence Periods
Miss Jones Amnda, 27/09/1988
Please record details of all periods where the client was absent from work due to sickness and some or all of the absence occurred since 10/02/2013.
If the client is currently absent from work, leave the End Date of the final period blank.
Start Date (dd/mm/yyyy)
End Date (dd/mm/yyyy)
Stated Reason
Action
01/01/2014
To Present
Back / Muscular problem
Remove
Add
Finish
Cancel

Should you not wish to deal with the Sick Absence Report at this time, the 'I will deal with the Sick Absence Report later' option should be selected. You will need to add the SAR information at the



Other supporting documentation

OH Assist may find it useful to consider other information when responding to a referral. For instance, if a job description is available, this may be helpful. These can be uploaded in the Other Supporting Information section, or faxed / posted to OH Assist.


OH Assist may find it useful to consider other information when responding to your referral. For instance, if a job description is available, this may be helpful.
I have paper copies of other relevant documentation and need a header to be able to fax/post it to OH Assist Healthcare
I have an electronic copy of a relevant document and want to upload it
I have no other relevant documentation / I will add relevant documentation later via 'View Referral'
Go >>

The fax/post and upload options work in the same manner as with a SAR or Consent however upon clicking upload there will various different document categories to choose from. Select the most appropriate document types to upload before browsing your computer and uploading.

Note: The document size limit for upload is 5MB.

If you do not have any supporting information to upload, the 'I have no other relevant documentation / I will add relevant documentation later via 'View Referral' option should be selected.

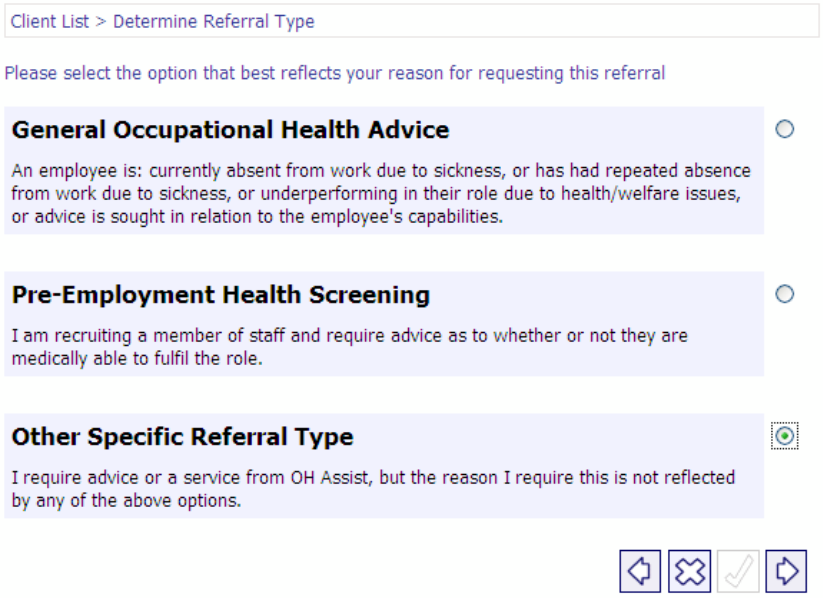
Once the informed consent, sick absence and other supporting document sections have been dealt with, the finish button becomes enabled. You can click finish to be taken to the view referral screen.

Additional services

If the product you require does not appear in the list of possible referral types, you should check your contract specific guidance or user manual. It may be that there is an alternative process that you should be following.

However, if appropriate, you can use the 'Other Specific Referral type' option to request a product or service from OH Assist.

To do this, click on the 'Other Specific Referral type' option when you are making a referral:


Client List > Determine Referral Type
Please select the option that best reflects your reason for requesting this referral
General Occupational Health Advice
An employee is: currently absent from work due to sickness, or has had repeated absence from work due to sickness, or underperforming in their role due to health/welfare issues, or advice is sought in relation to the employee's capabilities.
Pre-Employment Health Screening
I am recruiting a member of staff and require advice as to whether or not they are medically able to fulfil the role.
Other Specific Referral Type
I require advice or a service from OH Assist, but the reason I require this is not reflected by any of the above options.

You will be asked to describe the requirements you have of the service, including employee details such as name, pay number / staff ID, job title if this service relates to a specific employee. You then record where this service is to take place and any preferred dates in the appropriate boxes.

Normal authorisation processes should be followed such as requesting approval from an authoriser or raising a purchase order. You can also upload a document which the practitioner may find useful, such as job descriptions. Once all information has been completed, the user should click 'Submit'.

Note: It is mandatory to upload a completed copy of the Bespoke Requests Form. If you do not already have a blank copy of this form, you will be able to download one from this page, click submit and the option to download will be made available.

Description of Requirements
* Required (Max 1000 Characters)
Delivery Location Details
* Required (Max 500 Characters)
Preferred Range of Dates
* Required (Max 200 Characters)
Appropriate Invoicing Information
* Required (Max 100 Characters)
Upload Document
Upload referral request attachment documents
Before submitting your request, you must complete and attach a Bespoke Requests Form. Click here to download.
Submit

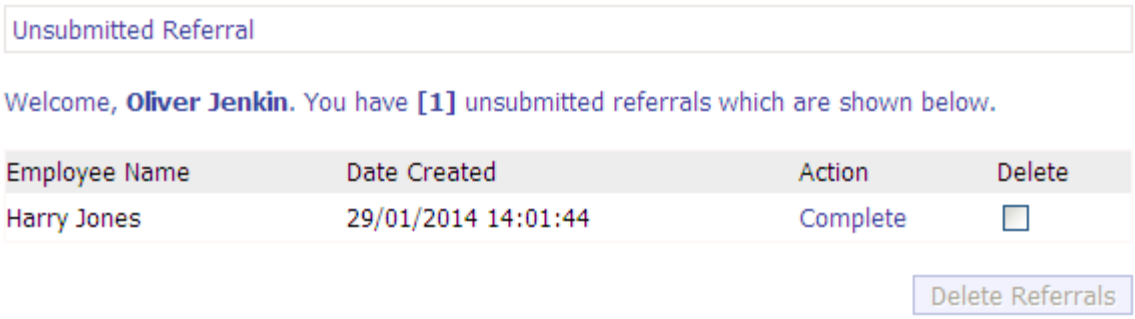
Unsubmitted referrals / saving progress

If for any reason you are unable to complete the submission of a referral – e.g. you have not gained consent from an employee and you need to save your progress and return at a later date its possible to save your progress for a particular page. Click on the next button (right arrow), on your current page to save.

You can then choose to log out or navigate to another area of the portal to manage any other work if you wish.

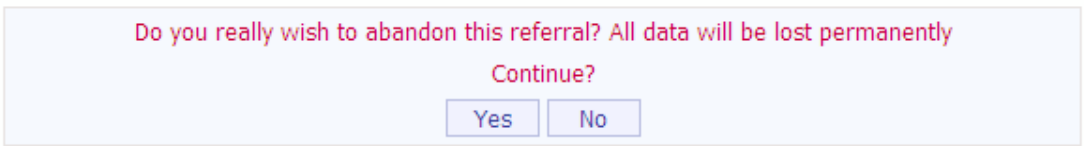
To complete the referral, click 'Unsubmitted referrals' in the Navigation menu. A list of all the current unsubmitted referrals you have will be displayed. You have the option to complete the referral or to delete it.

If you logged out, the list will be displayed immediately upon accessing the system again.



Abandon referral

If for any reason you wish to abandon a referral before you have submitted it. Click the button at the foot of the page. You will be given a warning message to check if you really wish to abandon your referral:



Managing Referrals

Viewing referrals, appointment maintenance, editing details, managing documents, restart a referral.

Managing referrals

In this section we will look at how to manage referrals that have been submitted to OH Assist. We will cover editing referral details, cancelling appointments, restarting referrals, referral updates and partially completed referrals.

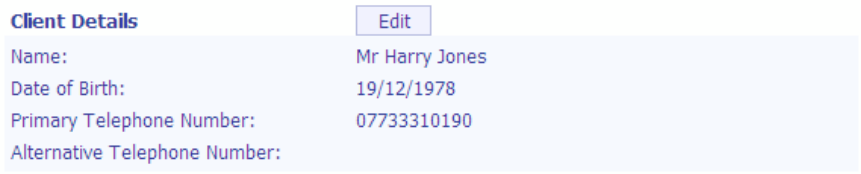
View referral screen

The View Referral Page is presented directly after dealing with the supporting documents. It can also be accessed from the client list screen by clicking on 'Referral' or the Referral ID if there is more than one referral for a particular employee.

The view referral page provides a summary enabling you to see the status and updates of this referral.

Employee information

The first section of the View Referral Page displays information relating to the employee who has been referred. You may choose to edit the employee information from here if required.



Client Details	Edit
Name:	Mr Harry Jones
Date of Birth:	19/12/1978
Primary Telephone Number:	07733310190
Alternative Telephone Number:	

Referral details

The referral details section outlines the referral ID, the referral type and sub type, the employee's pay number and other details of their work, the status of various referral elements.

Referral Details	
Referral ID:	2008389
Referral Type:	Occupational Health Advice
Referral Sub Type:	Occupational Health Advice
Customer identifier:	XYZ789
Customer Unit:	Corporate Services
Job Title:	Admin
Work Address:	Work Address v77
Referral Outcome:	Referral is still open
Special Requirements & Unavailability:	Special requirements : None
Informed Consent Status:	Not Required
Sick Absence Report Status:	Valid SAR Received
Referral Start Date:	29/01/2014 12:45:34
Referral End Date:	Still Open

Additional managers

If at any time you wish to add an additional manager to the referral, you may do so from the view referral page. Additional managers need to have a portal account for them to be added. Click Add / Remove to enable the search facility, you may search for a user to add by surname, email address or customer ID. You may also use this function to remove a manager from a referral.

Key point information

At defined checkpoints in the progression of a referral, an update will be made to the key point information allowing you to see, in real time, exactly what is happening.

The checkpoints include:

- Successful receipt of documentation
- Progression of the referral from scrutiny, and the intervention chosen including further medical evidence (FME)
- When appointments are scheduled together with the appointment details

You can see the full chronology of a referral (note: most recent at the top), providing transparency of our services and a useful management tool.

Key Point Information

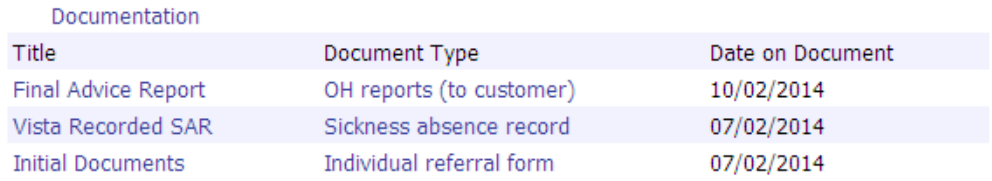
Type	Date/Time	Description
Referral processing complete	10/02/2014 12:00	Atos Healthcare completed the processing for this referral.
Sufficient information obtained	10/02/2014 12:00	Mr Oliver Jenkin (Administrator) considered all available information. It was decided that the medical practitioner had sufficient information to produce a report.
Appointment booked	06/02/2014 15:53	An appointment was booked for 07/02/2014 12:00 with Mr Oliver Jenkin This appointment was booked on-line
Referral processing started	06/02/2014 15:53	Atos Healthcare received all of the documentation that we required to enable your referral to be progressed. Your referral could then be processed.
Referral created	06/02/2014 15:53	Your referral was created.

Download reports

Any reports that are produced for the referral maybe downloaded from the view referral page.

There are three main documents that can be downloaded:

- Initial Documents – A Referral Form containing all of the information submitted to OH Assist
- Interim Report – During the progression of a referral, an Occupational Health Practitioner may feel the referrer may benefit from interim advice which may provide a more detailed update or support temporary changes in duty while the referral is progressing
- Final Report – The final advice provided by an Occupational Health Practitioner containing their full recommendations


Documentation

Title	Document Type	Date on Document
Final Advice Report	OH reports (to customer)	10/02/2014
Vista Recorded SAR	Sickness absence record	07/02/2014
Initial Documents	Individual referral form	07/02/2014

Users will not have access to any report unless they are named as an additional manager.

You will be notified that an update has been made to the referral and the fact that a report has been produced will be clearly shown in the key point information.

Click the relevant hyperlink to download the report immediately and either:

- Store it locally on their PC
- Store it on a file share on an HR system
- Print it to be stored in paper personnel files

The report will remain available to be downloaded if additional copies are required.

Upload supporting documents

If you chose to deal with a supporting document at a later time, they can be added from the view referral page. Scroll down to the bottom of the page to complete processing.

Upload document / Download header
Download Fax / Post Header
Download Informed Consent Template
Upload Document
Sick Absence
The client has had no sick absence in the last 12 months
Manually enter the sick absence periods
Go >>

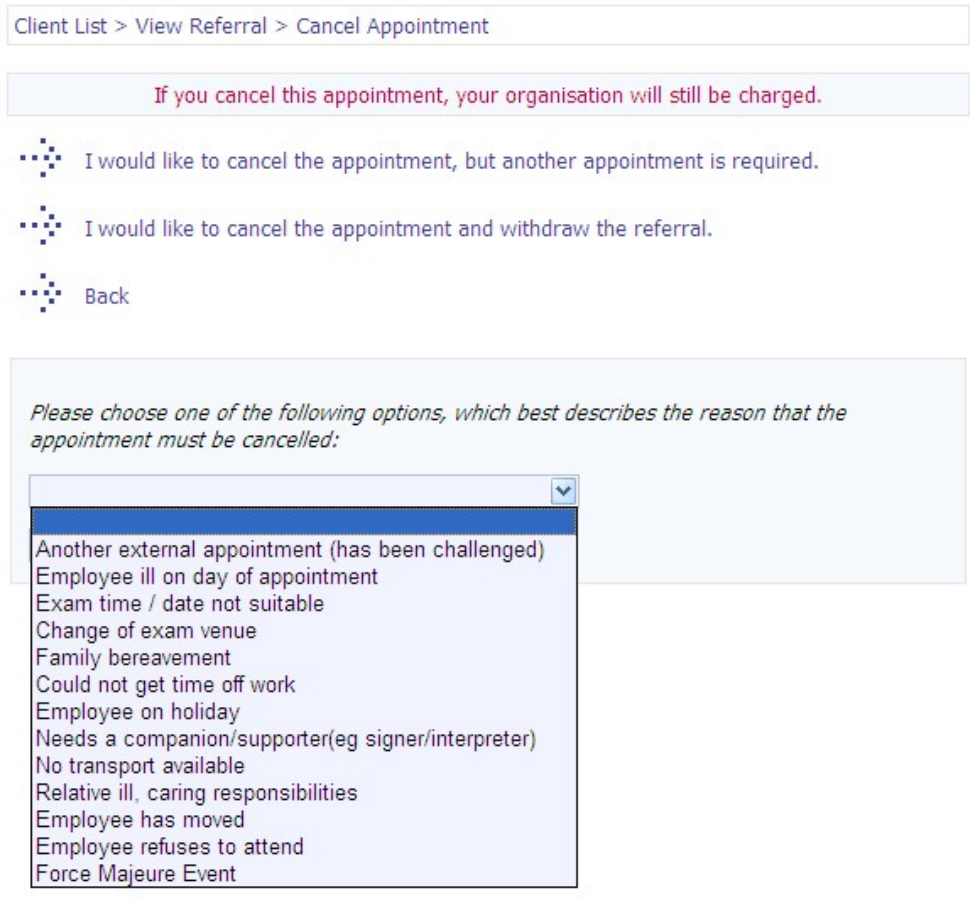
Cancelling an appointment

If you booked an appointment using the online booking facility it is also possible to cancel the appointment using the OH Portal. Please select your referral from the client list and scroll to the bottom of the screen to find the cancel option (If the appointment was not booked online this option will not be available, if you need to cancel then please call your customer helpdesk number).

If you choose to cancel and continue to another appointment, you must complete details of the reason for the cancellation. If the appointment is within 1 working day, your organisation may still be charged for the appointment. Once you have completed this step you will be prompted to choose another appointment slot.

Appointment cancelations may still result in your organisation being charged for the appointment. Please check your customer user guides cancelation policy for the details of the agreement.

Cancel and withdraw will result in the referral being closed, the cancelation policy will also apply to this option.


Client List > View Referral > Cancel Appointment
If you cancel this appointment, your organisation will still be charged.
I would like to cancel the appointment, but another appointment is required.
I would like to cancel the appointment and withdraw the referral.
Back
Please choose one of the following options, which best describes the reason that the appointment must be cancelled:
Another external appointment (has been challenged)
Employee ill on day of appointment
Exam time / date not suitable
Change of exam venue
Family bereavement
Could not get time off work
Employee on holiday
Needs a companion/supporter(eg signer/interpreter)
No transport available
Relative ill, caring responsibilities
Employee has moved
Employee refuses to attend
Force Majeure Event

Continue following an unsuccessful appointment

If an appointment was unsuccessful because an employee failed to attend an appointment then you will need to let us know if the appointment is still required. We will let you know that an appointment was unsuccessful by sending an email notification.

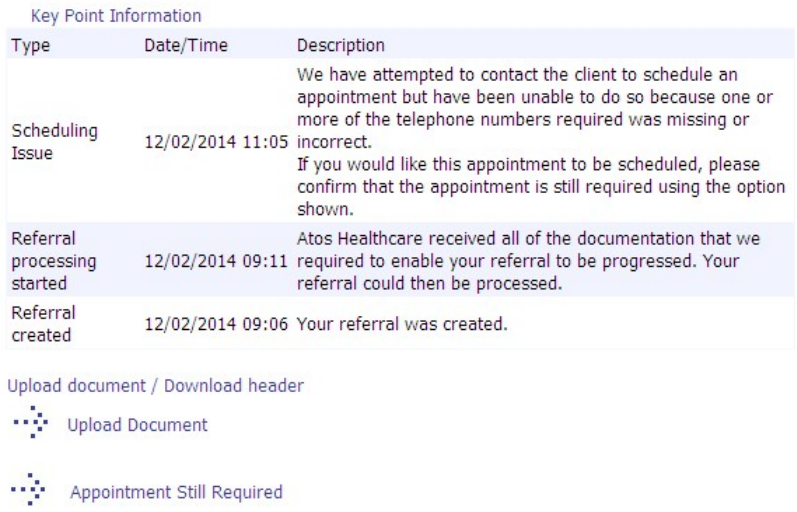
Following an unsuccessful appointment a new option will become available at the foot of the view referral page for the one in question.

You must let us know that a further appointment is required within 8 days of this notification being sent; otherwise the referral will be withdrawn. If a referral has been withdrawn, then you may choose to restart the referral. Instead of appointment still required, it will say restart referral; you will be given a new referral number following a restart.

Scheduling escalations

Where appointments are scheduled by OH Assist and we are unable to contact or agree an appointment with your employee our administrators will notify you of this using an escalation through the system. Upon an escalation being made you will receive an email notification advising to log in for more details. This will be displayed on the view referral page under key point information.

You will have 8 days following this notification to take corrective action and let us know an appointment is still required. In the example below you would need to update the phone number on the system and then click appointment still required. Otherwise the referral will be automatically withdrawn. If a referral has been withdrawn, then you may choose to restart the referral. Instead of appointment still required, it will say restart referral; you will be given a new referral number following a restart.


Key Point Information
Type
Date/Time
Description
Scheduling Issue
12/02/2014 11:05
We have attempted to contact the client to schedule an appointment but have been unable to do so because one or more of the telephone numbers required was missing or incorrect.
If you would like this appointment to be scheduled, please confirm that the appointment is still required using the option shown.
Referral processing started
12/02/2014 09:11
Atos Healthcare received all of the documentation that we required to enable your referral to be progressed. Your referral could then be processed.
Referral created
12/02/2014 09:06
Your referral was created.
Upload document / Download header
Upload Document
Appointment Still Required

Re-referring an employee

Once a referral has been completed you may wish to re-refer the individual, the usual circumstances where this applies are:

- The employee has not returned to work when expected
- The employee cannot complete a rehabilitation plan as expected
- There has been a change in the employee's circumstances that may need further advice
- The practitioner has recommended that the employee be re-referred if certain events occur

The employee's details and referral information from the previous related referral are available to you without having to be typed again.

You are given the opportunity to comment and add brief details informing us of the reason for the re-referral.

Withdrawing a referral

Should you no longer require a referral to be progressed, it should be withdrawn. To withdraw a referral please contact your Customer Helpdesk and ask for the referral to be withdrawn. You will be asked to provide the referral number, the employee's name and the reason the referral is being withdrawn.

Updates & Support

Keeping you up to date and support functions.

Messages, updates and support

We aim to keep you as up to date with the progress of your referral as we can. The OH portal has a number of functions to keep you in the loop, you can also customise what messages you get about a referral, so you only see the types of notification you want.

Referral updates & notifications

When something changes with a referral or if we are waiting for you to complete SAR information, an email will be sent automatically to notify you of what's occurring. For security the messages will not contain any of the employee's personal details, just a short message outlining what type of thing has happened. To get the full details you will need to log in to the OH portal and view the referral to see what's happened.

Currently the types of update we will send are:

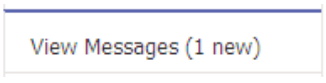
- Outstanding Information, a reminder that we are waiting for some information from you. E.g. Sickness Absence Record.
- Withdrawn – notification that your referral has been withdrawn.
- Outcome Report – notification that a final report has been produced and is available to view/download.
- Appointment Booked – notification that an appointment has been booked for your referral.
- Unsuccessful Appointment – notification that an appointment has not gone ahead, e.g. as a result of a cancelation.
- Scheduling Escalation – notification that we have not been able to book an appointment for your referral.
- Interim Report – notification that am interim report is available to view/download.
- Progress Update – a general update that is not covered by one of the above categories.

It is possible to switch off these notifications, to do this click on 'Maintain Account Details' from the navigation menu. A list of checkboxes with these categories will be visible, un-checking any will stop notifications being sent to you. We only recommend turning off notifications if you are a heavy user and check the portal on a regular basis.

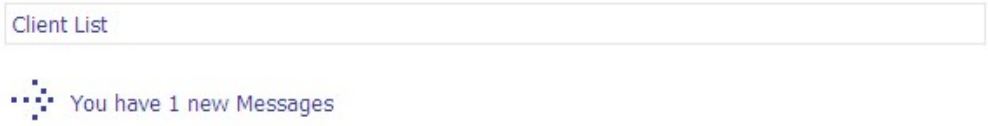
Messaging

The OH Assist Portal also has built in functionality for you to receive a secure message from our teams of health professionals and administrators.

When you receive a message you will be notified via email that a new message has been sent to you. This will appear in the same format as the notification messages you receive for referral updates. Upon receipt of a message you should log onto the portal and click on the messages button in the navigation menu.

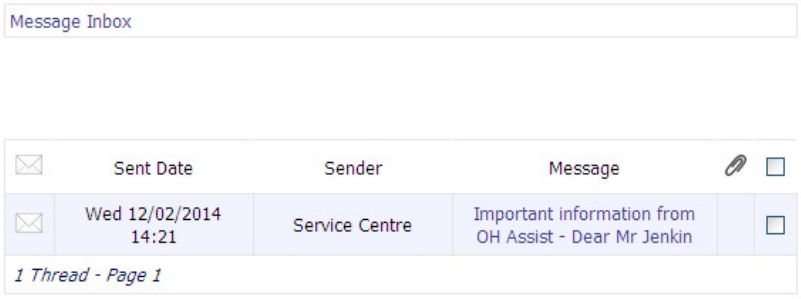


Additionally, when viewing the client list, another notification and link will appear at the top of the page:

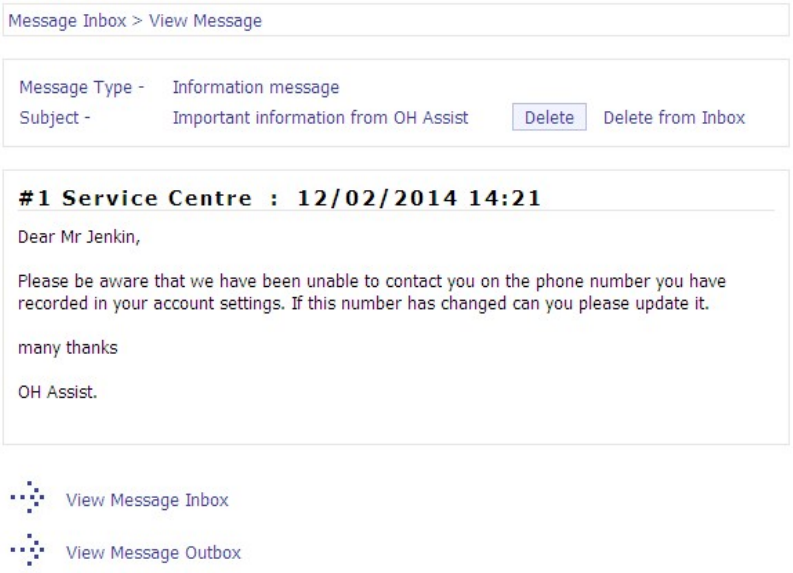


Message inbox

Upon clicking the link or view messages button you will be taken to the message inbox. From here you can view the message sent to you.



To view the full message, click on the text under 'Message'


Message Inbox > View Message
Message Type - Information message
Subject - Important information from OH Assist
Delete
Delete from Inbox
#1 Service Centre : 12/02/2014 14:21
Dear Mr Jenkin,
Please be aware that we have been unable to contact you on the phone number you have recorded in your account settings. If this number has changed can you please update it.
many thanks
OH Assist.
View Message Inbox
View Message Outbox

OH Assist may also use this function to send you files such as updated information packs. This will be in the form of an attachment which may be downloaded to your computer or company network.

Medical helpdesk

In addition to receiving messages from OH Assist you are able to send and receive secure messages to the Medical Helpdesk, if your organisation has this service available.

The purpose of this messaging service is to allow you to ask generic medical advice, e.g. generic advice about physical or mental health problems of employees at work, issues relating to the Disability Discrimination Act and whether or not to refer an employee.

Once you are logged into Vista you can access the link to send a message to the Medical Helpdesk by selecting 'Contact Us' or 'View Messages' from the Navigation Menu, then by selecting 'Contact Medical Helpdesk'.

Contact Medical Helpdesk
Please contact the Medical Helpdesk for generic medical advice e.g. Generic advice about physical or mental health problems of employees at work, issues relating to the Disability Discrimination Act, and whether or not to refer an employee.
Subject
Client Job Role, if applicable
Message
Send Message
Discard Message

You can create a new message by completing the Subject, Client Job Role (if applicable), and message fields. By selecting 'Send Message' your message will be sent to the Medical Helpdesk. By selecting 'Discard Message' you will permanently delete the message.

Messages are usually dealt with and replied to within 48 hours. You will receive an e-mail notification to your registered e-mail address that you have received a response and you will be able to view the messages as with other secure messages received (detailed above).

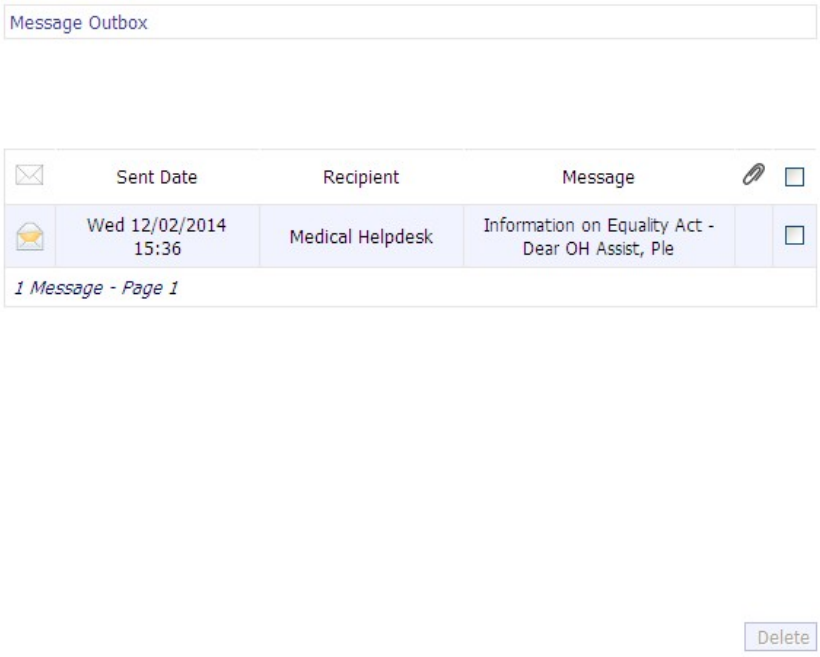
Once a response has been received from the Medical Helpdesk you can reply with further messages if you require more information or have additional questions.

Sent items

If you need to view any messages you have sent to the Medical helpdesk you can you view your sent items by clicking on view messages, then clicking the 'View sent items' link towards the bottom of the page.

Messages are displayed here until a response is received from the Medical Helpdesk. At the point a response is received from the Medical Helpdesk, the whole message thread containing your original message and the response will then be displayed in the Message Inbox.

You can move away from this screen by selecting any of the main navigation menu options or by selecting 'View Message Inbox' or 'Contact Medical Helpdesk' from the bottom of the screen.



FAQ / User guide

Additional support in the form of frequently asked questions can be viewed by clicking the relevant link in the navigation menu. You can also access the latest copy of this document.

Additional support

If you require further support with any of the features or in the rare instance where you encounter an error, please contact your customer helpdesk number which is listed in the contact us section of the portal, alternatively if you are having problems logging on your customer help desk number is listed in your customer user guide. While OH Assist endeavour to make the OH Portal available 24/7. Routine maintenance and updates may require system downtime. We will always (where feasible), give notice of planned downtime. This will be made by our customer management team to nominated parties in your organisation.

Account Settings and advanced functions

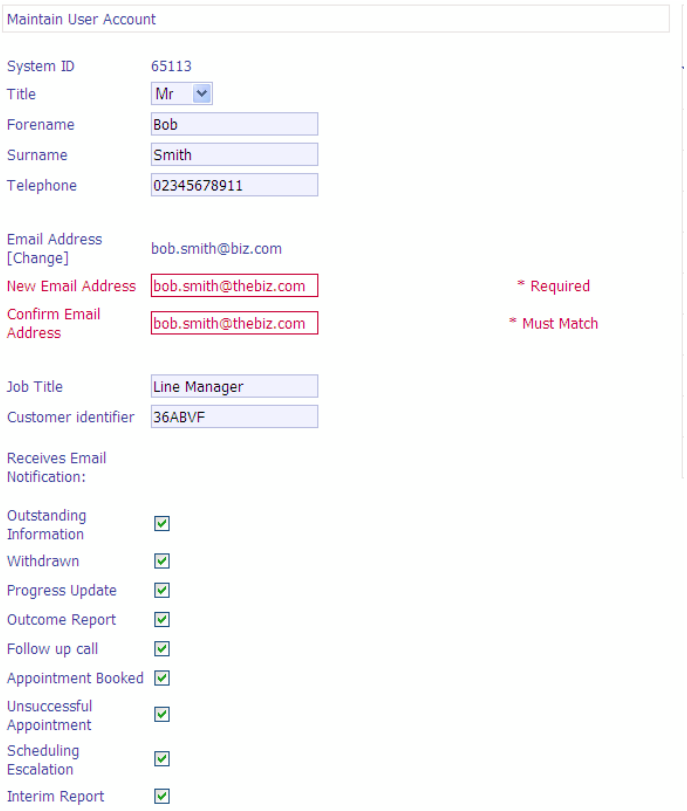
Change user details and power user functions.

User Accounts

The system currently offers 2 types of user account, portal user and power user. As the title suggest the power user account features more in depth features and allows a greater degree of control, allowing users to create other accounts for staff members, the ability to search for referrals made by other users and to transfer a referral from one user to another. In this section we will look at how to maintain your personal account and detail the power user functions.

Change account details

To amend your account details, select 'Maintain Account Details' in the navigation menu. You will then be presented with the Maintain User Account screen. You can change your title, name, contact details, whether you wish to receive update emails and reset your password.



When updates have been made you click save to make the changes. Any mandatory fields or mismatching information will require completion/correction.

Passwords must be strong. This means it should contain a variety of character types such as numbers, symbols, upper and lower case letters.

The security number must be 6 numbers.

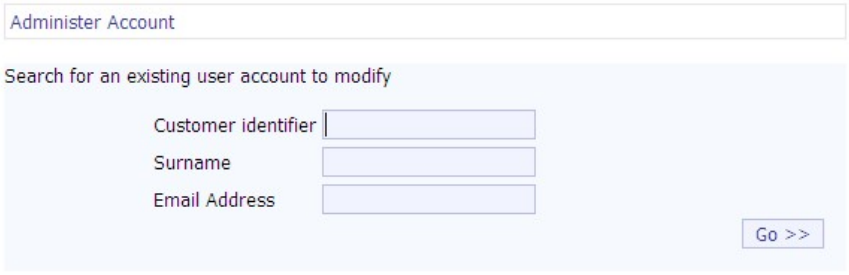
Power user functions

The Power User account allows the administration of other user accounts. Not all organisations have Power Users. A Power User will have all of the access permissions of a portal user with the following additional features:

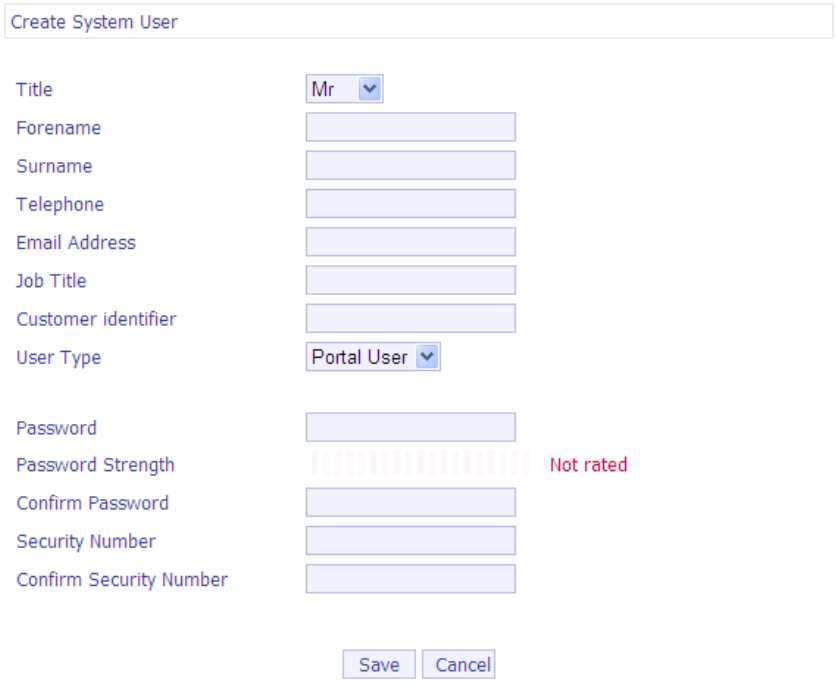
- Create new user accounts
- Create new Power user accounts
- Unlock or suspend user accounts
- Delete user accounts
- Transfer referrals between accounts
- Amend details contained within other accounts

Create new user accounts

To create a user account a Power User must enter the administer account function and search for the user to check they do not have an existing account. Following this, the Power User should click the '**My user does not exist. I need to create a new user**'link.


Administer Account
Search for an existing user account to modify
Customer identifier
Surname
Email Address
Go >>
My user does not exist. I need to create a new user.

You will be required to complete the following form and upon clicking save a new account will be created.



Upon saving the account you will need to pass on the login information to the user.

They will be required to change their password and security number upon first use.

Administer user accounts

A Power User can lock / unlock accounts, remove users and amend details in accounts. The Power User must enter the administer account function and search for the user.

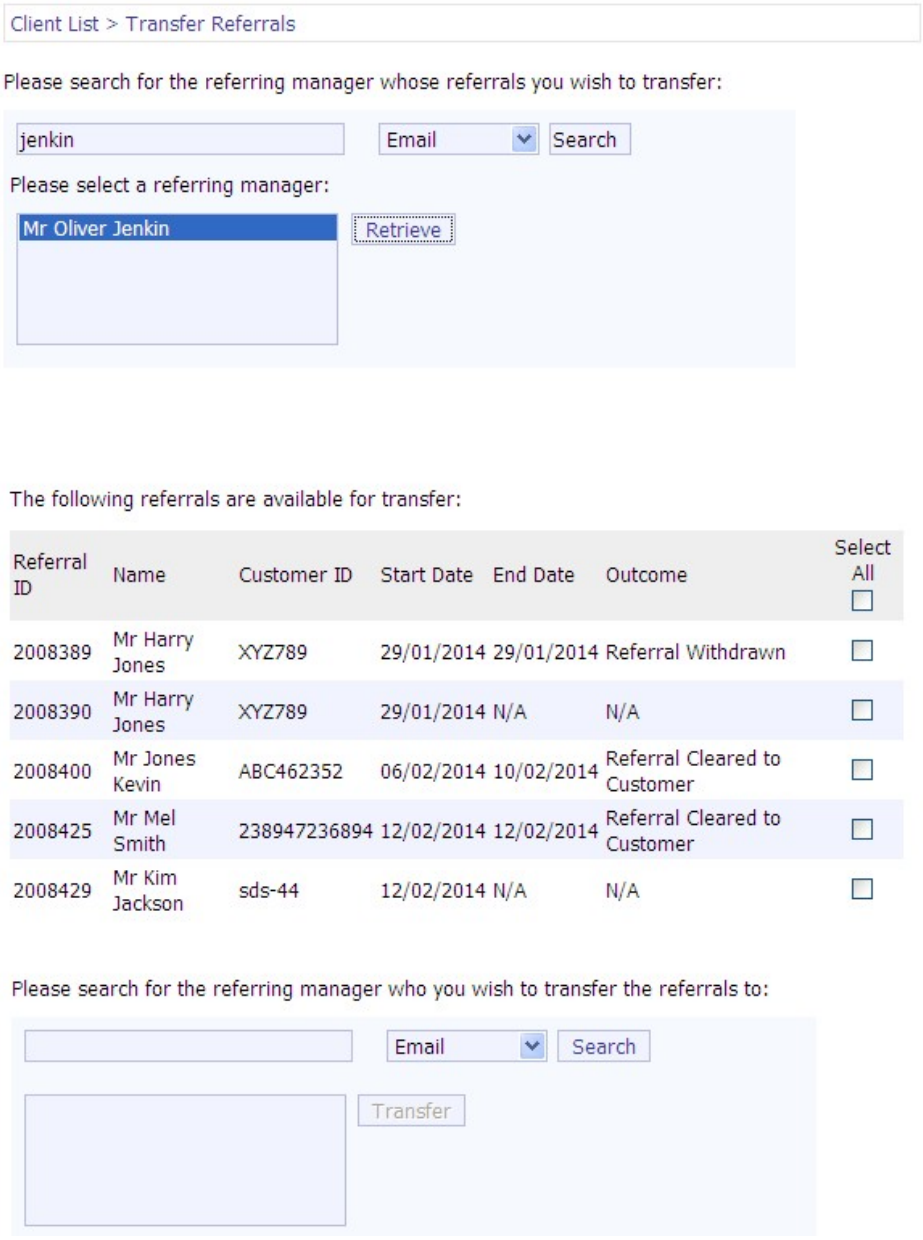
Here the user's details can be amended, make the choice of receiving the notification emails, change their user type, lock or unlock the account by checking / un-checking the box and reset the password and PIN. Click, save to save the changes. The account is deleted by clicking the 'Delete User' button. This cannot be undone.

Transfer referral

Transfer of referrals allows a Power User to transfer referrals from one user to another. This is useful if a manager leaves the employment of our customer or is absent for a period of time.

This can be initiated from several different points:

- From the View Referral Screen – By clicking the Transfer Referral link in the Navigation Menu the single referral can be transferred
- From the Client List screen – By clicking the Transfer Referral a search dialogue will be displayed. This asks the Power User to find a manager whose referrals they wish to transfer
- From the View Client Screen – By clicking the Transfer Referral link in the Navigation Menu individual or all referrals can be transferred to a different manager
- When deleting user accounts – all referrals where the user is the referring manager must be transferred before the account is deleted



The user searches for a destination manager (the manager who is to inherit the referrals) and clicks Transfer. A message of confirmation is displayed at the bottom of the screen.

Appendix A - Glossary

Term	Description
ACT	Average Clearance Time – A method of measuring the performance of a service
BPM	Business Process Management
Client	The employee who is the subject of the referral
Cosmas	OH Assist's internal core case tracking system
Customer Portal aka Cosmas Vista	Web browser based application for customers to use to access OH Assist's services
DNA	Did not attend – usually an employee for a scheduled appointment
Fax Server	A server that receives faxes and produces an electronic image of the fax
FME	Further Medical Evidence – usually asked for, in writing, from an employee's GP or hospital specialist
IC	Informed Consent – Form signed by the employee giving their consent to a referral
KPI	Key Performance Indicator
OHA	Occupational Health Advisor
OHCSS	Occupational Health Counselling and Screening Services
OSR	Outcome Summary Report – produced after the final intervention of a referral
Power User	A user account with additional access rights for maintaining user accounts. Contained both within the customer's and OH Assist's organisation
Referrer	The person making a referral (usually a manager or HR specialist)
SAR	Sick Absence Report – A report detailing an employee's absence history
Scrutiny	A process where an occupational health practitioner makes a decision on the most appropriate intervention for a referral
User	A user of the OH Portal – normally a referring manager